

FOR PROFESSIONAL INVESTORS - 09/04/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Slightly Lower

JCI slightly weakened and closed at 7,867 (-19 points or -0.23%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR -305Bn today and rupiah was stabilized at IDR 16,420/USD.

Banking stocks were mixed as BMRI (+1.3%), BBCA (+0.31%), and BNL (0.64%) closed higher, while BBNI (-0.91%) and BBRI (-0.74%) down. Consumer names were mixed as MYOR (+1.43%), GGRM (+2.62%), and SIDO (+0.95%) advanced, while ICBP (-0.54%) and INDF (-2.27%) corrected. Poultry stocks were positive as CPIN (+2.03%), JPFA (+4.76%), and MAIN (+1.49%) all in green. Mining names were mostly negative as INCO (-0.76%), TINS (-3.29%), INDY (-5.42%), and ANTM (-2.59%) all corrected, except ADRO (+1.73%). Other movers were MSIN (+24.3%), POLU (+19.79%), PYFA (-10.94%), and ENRG (-6.25%).

Central Statistics Agency (BPS) recorded foreign tourist arrival growth of +13% YoY to 1.48mn in July 2025, resulting in overall 7M25 growing by +10% YoY to 8.5mn tourist arrivals. Association of travel and tourism estimate the tourism industry could grow by +15% YoY this year.

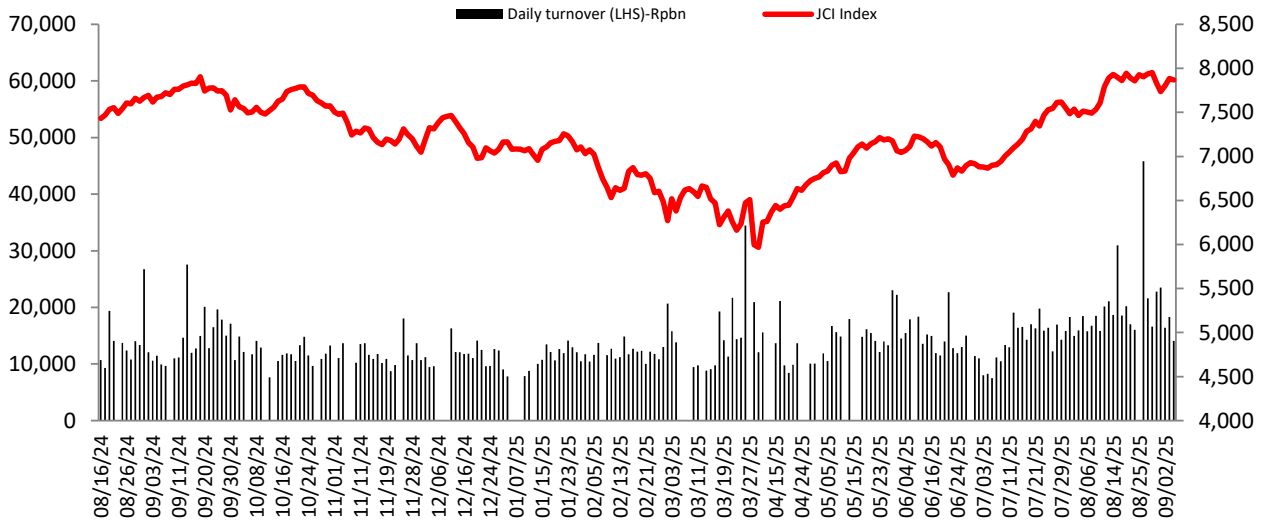
BOND MARKET

WITHIN RANGE

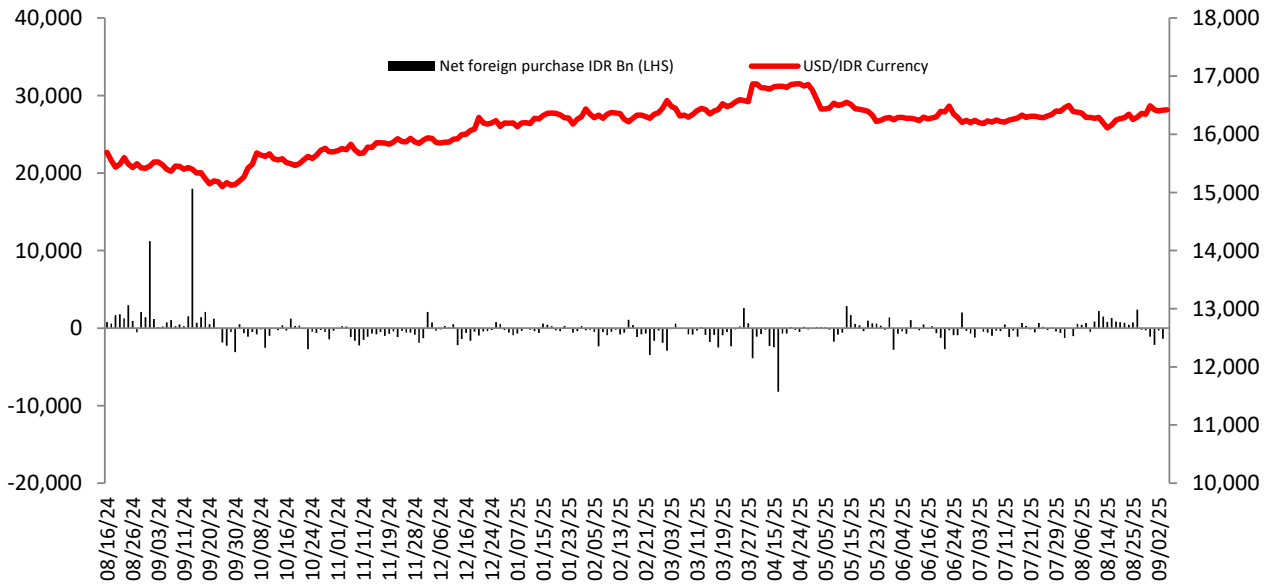
Indonesia bond market opened in wide spread today. Market trading was active, particularly in the afternoon session. Buying interest was driven by onshore foreign banks while offshore activity was very quiet. Despite we heard several actions in the bond market, price movement was relatively within range. At the end of the day, the yield curve was slid lower by about 2 – 4 bps. Trading activities were mainly done in 5Y and 10Y area.

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	99.8	0.0	3.7	5Y
FR91	FR0091 Govt	101.7	0.0	5.5	10Y
FR93	FR0093 Govt	98.9	(0.1)	4.3	15Y
FR92	FR0092 Govt	102.9	0.0	2.7	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	100.9	(0.0)	3.0	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.8	0.3		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.7	(0.0)		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,867.3	(0.2)	11.1	
Thailand	SET Index	1,252.7	(0.5)	(10.5)	
Korean Stock Exch.	KOSPI Index	3,200.8	0.5	33.4	
Straight Times	FSSTI Index	4,299.7	0.2	13.5	
Kuala Lumpur	KLCI Index	1,578.2	(0.0)	(3.9)	
Philippines	PCOMP Index	6,106.9	0.4	(6.5)	
Nikkei	NKY Index	42,580.3	1.5	6.7	
Hang Seng	HSI Index	25,058.5	(1.1)	24.9	
MSCI-Asia pacific	MXAP Index	210.4	(0.5)	15.9	
<u>Global Indices</u>					
Dow Jones	INDU Index	45,271.2	(0.1)	6.4	
S&P 500	SPX Index	6,448.3	0.5	9.6	
Nasdaq	CCMP Index	21,497.7	1.0	11.3	
FTSE 100	UKX Index	9,183.3	0.1	12.4	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,420.0	(0.0)	(1.9)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,423.9	(0.1)	1.1
3 month	IDSWT3M Index	16,421.1	0.1	(1.7)
6 month	IDSWT6M Index	16,430.0	0.2	(1.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,447.8	0.1	(1.7)
6 month	IDFWT6M Index	16,465.0	0.1	(1.5)

*price as of 9/3/2025

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