



FOR PROFESSIONAL INVESTORS - 03/05/2026

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Rebound

JCI advanced and closed at 7,711 (+133 points or +1.76%) today. Shares across regional markets were positive. Meanwhile, foreign investors recorded net outflow of IDR 210Bn today and rupiah was stabilized at IDR 16,883/USD.

Banking stocks were positive as BBCA (+3.27%), BMRI (+2.91%), BBRI (+1.63%), BBNI (+3.13%), and BNLI (+3.65%) all closed higher. Consumer names were positive as KLBF (+2.46%), INDF (+1.63%), HMSP (+4.97%), UNVR (+2.84%), and GGRM (+1.64%) all in green. Pulp & paper stocks were positive as INKP (+3.34%) and TKIM (+6.93%) all in green. Telco names were positive as TLKM (+1.88%), ISAT (+2.75%), and EXCL (+1.77%) all in green. Other movers were MSIN (+9.18%), IMPC (+6.2%), INDS (-14.52%), and POLU (-6.03%).

Fitch Ratings has lowered Indonesia's outlook from stable to negative, while affirming the country's rating at "BBB". The outlook revision reflects heightened policy uncertainty, as well as concerns over policy consistency and credibility amid increasingly centralised decision-making authority.

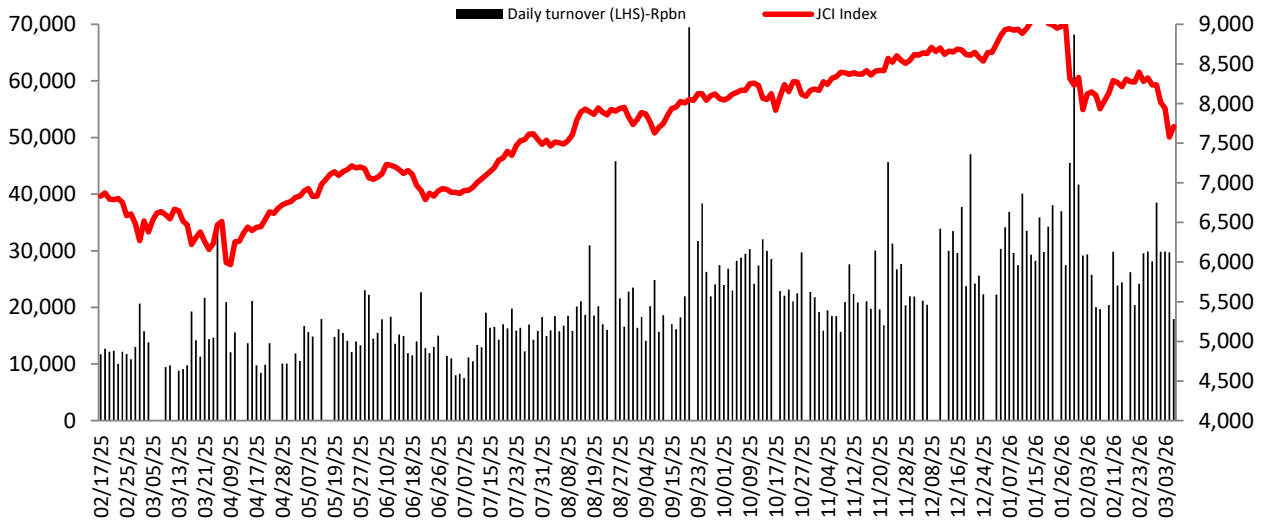
BOND MARKET

FLOW DRIVEN

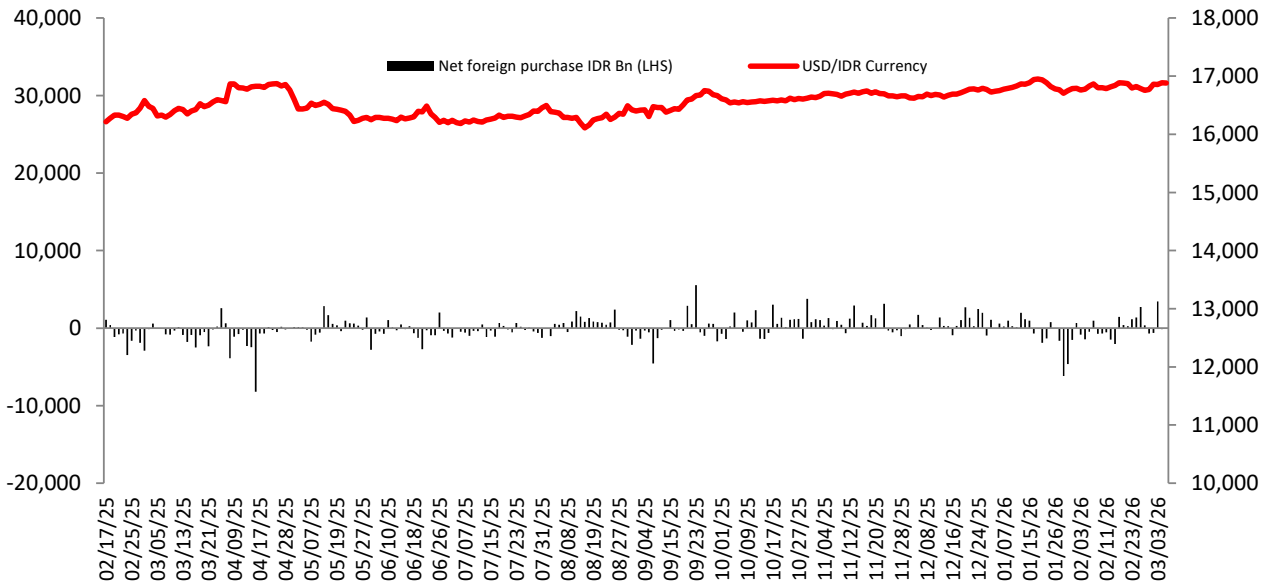
Indonesia bond market opened the day firmer after Fitch rating announcement yesterday. Biddish tone were felt in bond market, triggered by stronger rupiah to 16,879 levels and UST touched above 4.1%. Flow was mainly heard from mixed names collecting non benchmark and benchmark series throughout the day. Market trading was particularly active on 5Y – 10Y areas which remained as the most actively traded bonds for the day. Market closed with 10Y closed lower to level 6.59% and 5Y closed at 5.93%.

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	100.0	0.0	(0.3)	5Y
FR91	FR0091 Govt	101.4	0.1	(1.1)	10Y
FR93	FR0093 Govt	99.6	(0.1)	(1.8)	15Y
FR92	FR0092 Govt	104.4	0.2	(1.8)	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	100.8	(0.1)	(0.4)	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	103.6	0.0	(1.5)	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	101.7	0.0	(0.1)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,710.5	1.8	(10.8)	
Thailand	SET Index	1,407.9	1.7	11.8	
Korean Stock Exch.	KOSPI Index	5,583.9	9.6	32.5	
Straight Times	FSSTI Index	4,838.8	0.5	4.1	
Kuala Lumpur	KLCI Index	1,713.2	0.9	2.0	
Philippines	PCOMP Index	6,380.5	1.2	5.4	
Nikkei	NKY Index	55,278.1	1.9	9.8	
Hang Seng	HSI Index	25,321.3	0.3	(1.2)	
MSCI-Asia pacific	MXAP Index	239.2	(3.9)	5.1	
<u>Global Indices</u>					
Dow Jones	INDU Index	48,739.4	0.5	1.4	
S&P 500	SPX Index	6,869.5	0.8	0.4	
Nasdaq	CCMP Index	22,807.5	1.3	(1.9)	
FTSE 100	UKX Index	10,607.1	0.4	6.8	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,883.0	0.0	(1.1)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,907.4	0.3	1.1
3 month	IDSWT3M Index	16,909.3	0.2	(1.2)
6 month	IDSWT6M Index	16,905.3	0.2	(1.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,939.6	0.3	(1.3)
6 month	IDFWT6M Index	16,947.8	0.2	(1.1)

*price as of 3/4/2026

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