

FOR PROFESSIONAL INVESTORS - 11/13/2024

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Slightly Lower

JCI slightly weakened and closed at 7,309 (-13 points or -0.18%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR -1.1Tn today and rupiah was stabilized at IDR 15,775/USD.

Banking stocks were mostly positive as BBRI (+1.78%), BMRI (+0.78%), MEGA (+2.07%), and BBNI (+0.61%) all advanced, except PNB (-3.53%). Consumer names were mixed as MYOR (-1.16%), UNVR (-1.37%), and INDF (-1.59%) weakened, while HMSP and ICBP unchanged. Properties stocks were negative as LPKR (-3.31%), BSDE (-1.91%), PWON (-2.24%), and CTRA (-3.02%) all corrected. Material names were negative as BRPT (-1.66%) and TPIA (-2.84%) all down. Other movers were MLPT (+19.91%), ARTO (+4.07%), DSNG (-17.88%), and BRMS (-6.38%).

Indo Oct-24 consumer confidence index fell to 121.1, the lowest since Dec-22, mainly due to declines in the current income, durable goods purchase, and job availability indices.

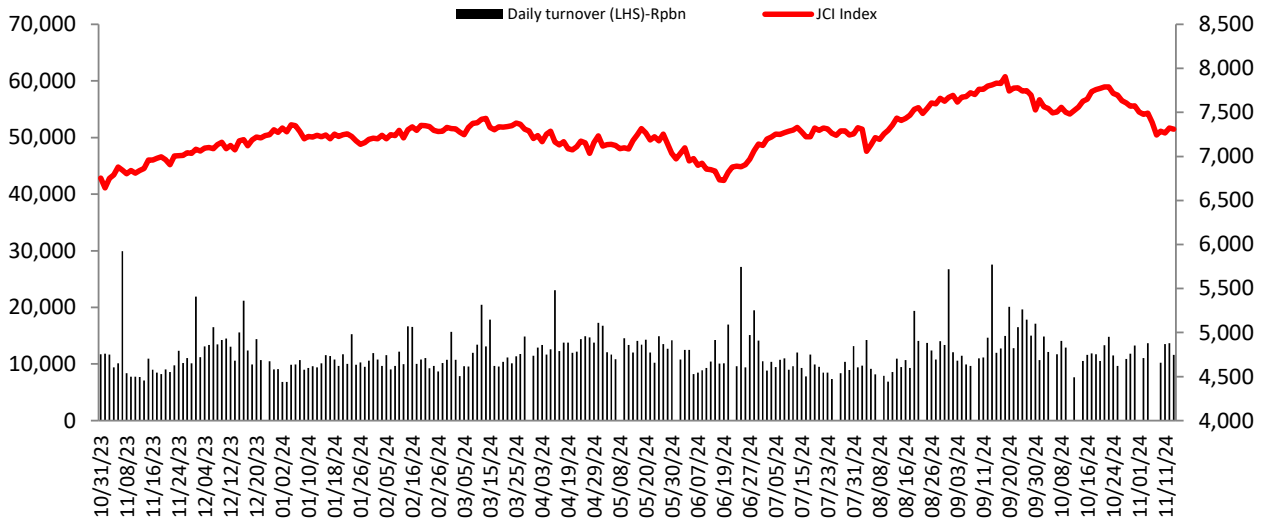
BOND MARKET

Selling pressure

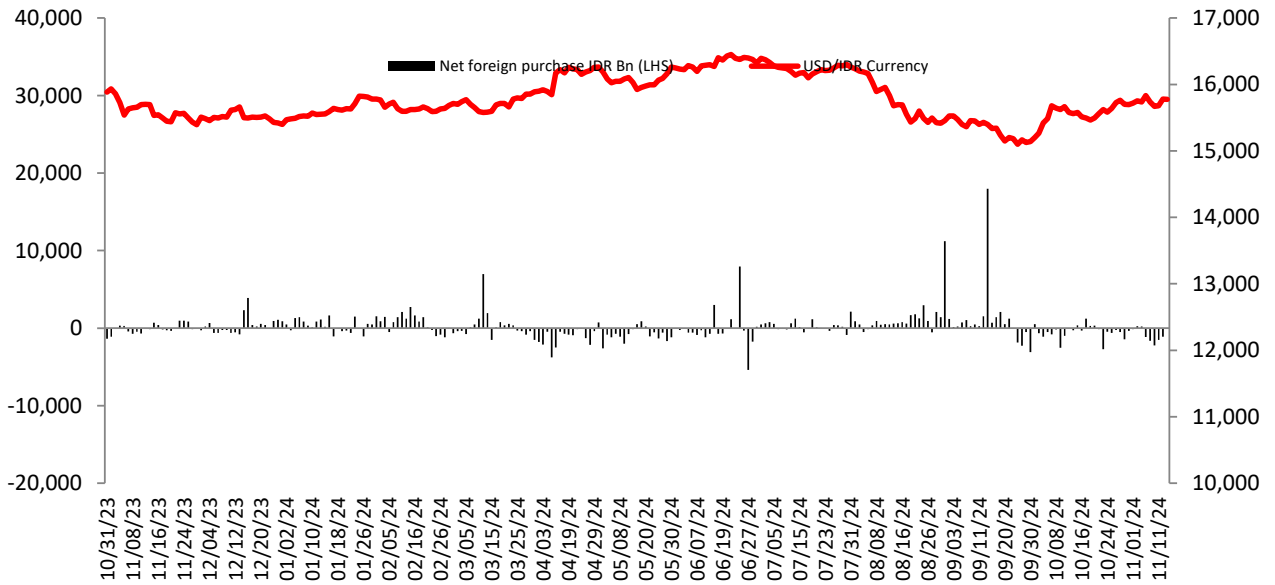
Indonesia bond market opened the day with another selling seen in 10Y tenor area following higher UST yield movement. The 10Y FR103 were traded to as low as 97.90 (7.03%) before bottom fisher came into the market. The selling pressure halted and yields went back to yesterday closing level. The market were more muted in afternoon session with no significant trade seen. The benchmark series of 5-10-15-20Y closed the day at mid yield of 6.65%, 6.90%, 7.01%, and 7.04% respectively, higher by 1-6bps compared to yesterday's closing. All eyes are now on US CPI data tonight.

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	97.0	0.0	0.8	5Y
FR91	FR0091 Govt	97.4	(0.4)	(1.7)	10Y
FR93	FR0093 Govt	95.7	(0.3)	(2.4)	15Y
FR92	FR0092 Govt	101.1	(0.2)	(2.7)	20Y
PBS036	INDOIS 5 ¼ 08/15/25	99.5	0.0	1.4	15-8-2025
PBS003	INDOIS 6 01/15/27	98.9	#VALUE!	1.0	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.8	0.0	0.5	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.6	(0.0)	(0.2)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,308.7	(0.2)	0.5	
Thailand	SET Index	1,451.9	0.5	2.5	
Korean Stock Exch.	KOSPI Index	2,417.1	(2.6)	(9.0)	
Straight Times	FSSTI Index	3,720.3	0.2	14.8	
Kuala Lumpur	KLCI Index	1,611.5	0.2	10.8	
Philippines	PCOMP Index	6,714.3	(1.4)	4.1	
Nikkei	NKY Index	38,721.7	(1.7)	15.7	
Hang Seng	HSI Index	19,823.5	(0.1)	16.3	
MSCI-Asia pacific	MXAP Index	185.0	(1.5)	9.2	
<u>Global Indices</u>					
Dow Jones	INDU Index	43,911.0	(0.9)	16.5	
S&P 500	SPX Index	5,984.0	(0.3)	25.5	
Nasdaq	CCMP Index	19,281.4	(0.1)	28.4	
FTSE 100	UKX Index	8,050.7	0.3	4.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,775.0	0.0	(2.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,780.0	0.6	2.4
3 month	IDSWT3M Index	15,777.8	0.7	(2.1)
6 month	IDSWT6M Index	15,781.3	0.7	(2.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,790.9	0.6	(2.2)
6 month	IDFWT6M Index	15,846.0	0.7	(2.1)

*price as of 11/13/2024

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