

FOR PROFESSIONAL INVESTORS - 02/06/2024

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Higher

JCI advanced and closed at 7,247 (+49 points or +0.68%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 765Bn today and rupiah slightly weakened to IDR 15,730/USD.

Banking stocks were mostly positive as BBRI (+0.87%), BBKA (+0.52%), BMRI (+0.37%), and BBNI (+0.43%) all rose, except BBTN (-0.79%). Consumer names were positive as GGRM (+4.23%), UNVR (+1.56%), HMSP (+3.49%), INDF (+0.79%), and ICBP (+0.44%) all closed higher. Properties stocks were positive as CTRA (+4.17%), SMRA (+2.78%), BSDE (+1.47%), and LPKR (+1.25%) all inched higher. Material names were positive as BRPT (+1.46%) and TPIA (+0.46%) all closed higher. Other movers were MCAS (+19.2%), EXCL (+4.41%), INCO (-4.18%), and DSSA (-4%).

Indonesia GDP 4Q23 up 45bps QoQ, 5.04% YoY. INLINE with 23CL 5%. This is also broadly inline with economists forecast of 4.6-5.15%.

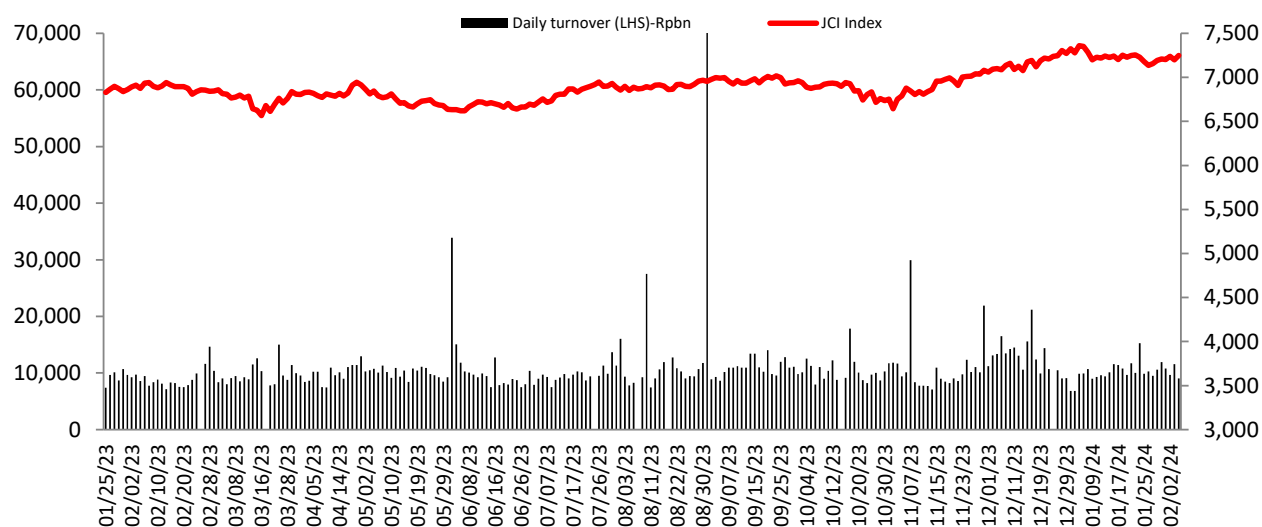
BOND MARKET

WITHIN RANGE

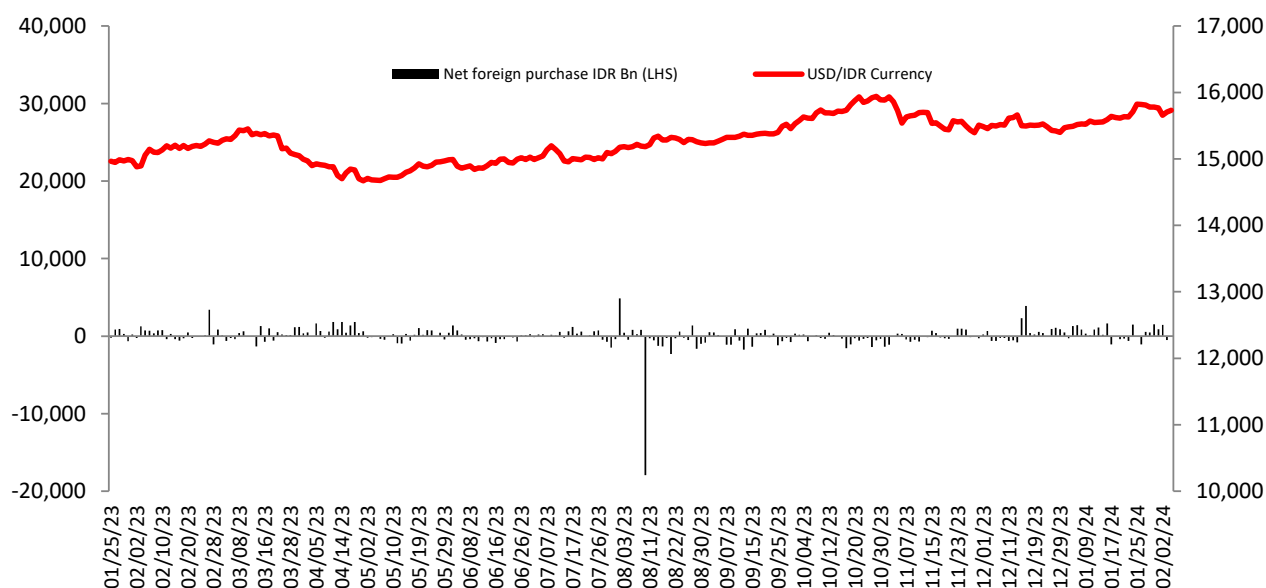
Indonesia bond market closed the day relatively flat. The mixed sentiment continued to be seen in the bond market today with same movement pattern as yesterday's. We witnessed several sporadic activity. Overall, IDR bonds yield lower 1 – 2 bps compared to yesterday closing and IDR bonds still traded within range. The benchmark of 5Y, 10Y, 15Y and 20Y closed at mid yields of 6.5%, 6.6%, 6.75% and 6.84% respectively.

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	96.7	#VALUE!	0.5	5Y
FR91	FR0091 Govt	98.4	(0.5)	(0.7)	10Y
FR93	FR0093 Govt	97.0	(0.2)	(1.4)	15Y
FR92	FR0092 Govt	102.8	(0.2)	(1.0)	20Y
PBS036	INDOIS 5 ¾ 08/15/25	98.6	0.0	0.5	15-8-2025
PBS003	INDOIS 6 01/15/27	98.7	0.0	0.5	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.5	0.0	0.2	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.4	0.0	(0.4)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,247.4	0.7	(0.3)	
Thailand	SET Index	1,397.2	1.0	(1.3)	
Korean Stock Exch.	KOSPI Index	2,576.2	(0.6)	(3.0)	
Straight Times	FSSTI Index	3,125.7	(0.3)	(3.5)	
Kuala Lumpur	KLCI Index	1,513.0	0.1	4.0	
Philippines	PCOMP Index	6,755.3	0.4	4.7	
Nikkei	NKY Index	36,160.7	(0.5)	8.1	
Hang Seng	HSI Index	16,136.9	4.0	(5.3)	
MSCI-Asia pacific	MXAP Index	165.8	(0.4)	(2.1)	
<u>Global Indices</u>					
Dow Jones	INDU Index	38,380.1	(0.7)	1.8	
S&P 500	SPX Index	4,942.8	(0.3)	3.6	
Nasdaq	CCMP Index	15,597.7	(0.2)	3.9	
FTSE 100	UKX Index	7,658.1	0.6	(1.0)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,730.0	(0.2)	(2.1)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,695.4	(0.5)	1.8
3 month	IDSWT3M Index	15,657.8	(0.6)	(1.3)
6 month	IDSWT6M Index	15,670.0	(0.6)	(1.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,696.6	(0.6)	(1.6)
6 month	IDFWT6M Index	15,713.3	(0.6)	(1.3)

*price as of 2/6/2024


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