

FOR PROFESSIONAL INVESTORS - 08/02/2024

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Pullback

JCI slightly weakened and closed at 7,308 (-18 points or -0.24%) today. Shares across regional markets were negative. Meanwhile, foreign investors recorded net inflow of IDR 474Bn today and rupiah slightly strengthened to IDR 16,200/USD.

Banking stocks were mixed as BMRI (+0.74%), BBNI (+0.49%), and MEGA (+0.5%) rose, while BBRI (-0.84%) and BBCA (-1.69%) corrected. Consumer names were mostly negative as KLBFI (-0.61%), MYOR (-2.37%), INDF (-0.81%), and UNVR (-2.8%) all down, except ICBP (+1.59%). Telco stocks were negative as FREN (-3.33%), ISAT (-3.27%), and TLKM (-1.04%) all down. Retailer names were mixed as MAPI (+4.29%) and MAPA (+1.74%) in green, while ACES (-4.4%) and AMRT (-3.9%) retreated. Other movers were DSSA (+5.88%), BSDE (+4.35%), ESSA (-4.76%), and BFIN (-4.26%).

Indonesia July CPI +2.1% YoY, -0.18% MoM. Indonesia's consumer prices rose 2.13% in July from the previous year. Core inflation +1.95% y/y, food, drinks & tobacco +3.66% y/y, health +1.77% y/y.

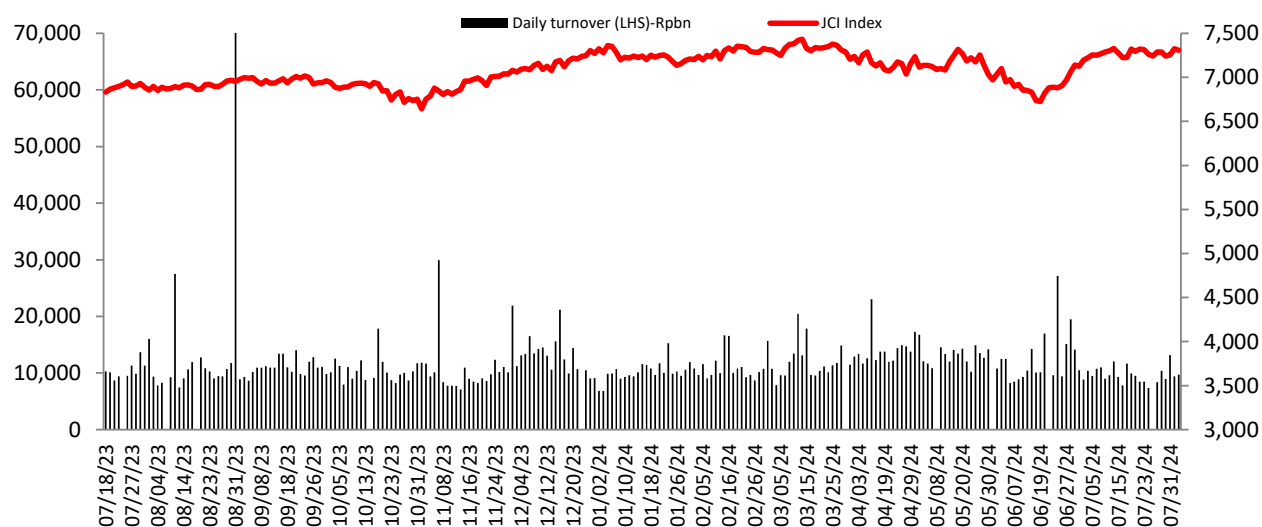
BOND MARKET

WITHIN RANGE

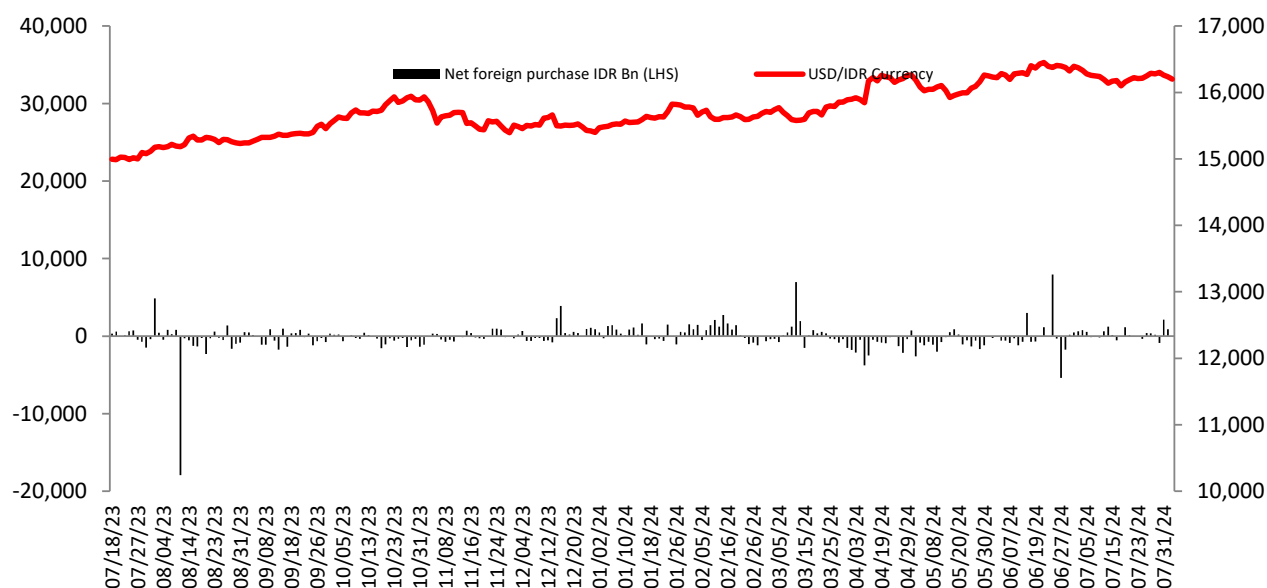
Indonesia bond market closed the week relatively flat. The mixed sentiment continued to be seen in the bond market today with the bond price opened around the same level as yesterday's closing. We witnessed several sporadic activity although the volume was very limited. Overall, IDR bonds yield lower 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 6.68%, 6.83%, 6.95% and 7% 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	96.4	0.0	0.1	5Y
FR91	FR0091 Govt	97.4	0.1	(1.7)	10Y
FR93	FR0093 Govt	96.4	0.0	(1.8)	15Y
FR92	FR0092 Govt	101.1	0.5	(2.6)	20Y
PBS036	INDOIS 5 ¾ 08/15/25	98.9	0.1	0.8	15-8-2025
PBS003	INDOIS 6 01/15/27	98.3	0.0	0.3	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.5	(0.0)	0.1	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.2	(0.0)	(0.6)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,308.1	(0.2)	0.5	
Thailand	SET Index	1,314.0	(0.7)	(7.2)	
Korean Stock Exch.	KOSPI Index	2,676.2	(3.7)	0.8	
Straight Times	FSSTI Index	3,381.5	(1.1)	4.4	
Kuala Lumpur	KLCI Index	1,611.1	(0.8)	10.8	
Philippines	PCOMP Index	6,605.3	(1.3)	2.4	
Nikkei	NKY Index	35,909.7	(5.8)	7.3	
Hang Seng	HSI Index	16,945.5	(2.1)	(0.6)	
MSCI-Asia pacific	MXAP Index	182.3	(0.7)	7.6	
<u>Global Indices</u>					
Dow Jones	INDU Index	40,348.0	(1.2)	7.1	
S&P 500	SPX Index	5,446.7	(1.4)	14.2	
Nasdaq	CCMP Index	17,194.1	(2.3)	14.5	
FTSE 100	UKX Index	8,255.4	(0.3)	6.8	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,200.0	0.2	(5.0)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,245.6	(0.3)	5.4
3 month	IDSWT3M Index	16,242.6	(0.3)	(5.1)
6 month	IDSWT6M Index	16,227.0	(0.4)	(5.2)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,264.2	(0.3)	(5.3)
6 month	IDFWT6M Index	16,315.1	(0.2)	(5.2)

*price as of 8/2/2024



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