



FOR PROFESSIONAL INVESTORS - 10/06/2023

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Lower Again

JCI slightly weakened and closed at 6,875 (-12 points or -0.17%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 673Bn today and rupiah slightly strengthened to IDR 15,615/USD.

Banking stocks were mixed as MEGA (+0.48%) and PNBN (+2.44%) advanced, while BBTN (-0.4%), BBCA (-1.36%), and BBRI (-1.43%) down. Consumer names were positive as KLBF (+3.97%), ICBP (+3.79%), MYOR (+7.51%), INDF (+1.85%), and UNVR (+2.23%) all closed higher. Mining stocks were negative as PTBA (-1.12%), INCO (-1.38%), ANTM (-2.01%), ITMG (-3.22%), and ADRO (-1.88%) all retreated. Poultry names were positive as CPIN (+3.21%), JPFA (+3.04%), and MAIN (+1.69%) all inched higher. Other movers were PTPP (+10.37%), SILO (+9.86%), MPRO (-24.17%), and MEDC (-7.09%).

Indonesia 10-Year Yield Rises 8bps to 7.10%, Highest Since Nov. Indonesian government bond yields rise across the curve, following US Treasury yields higher and after weak demand at a primary auction.

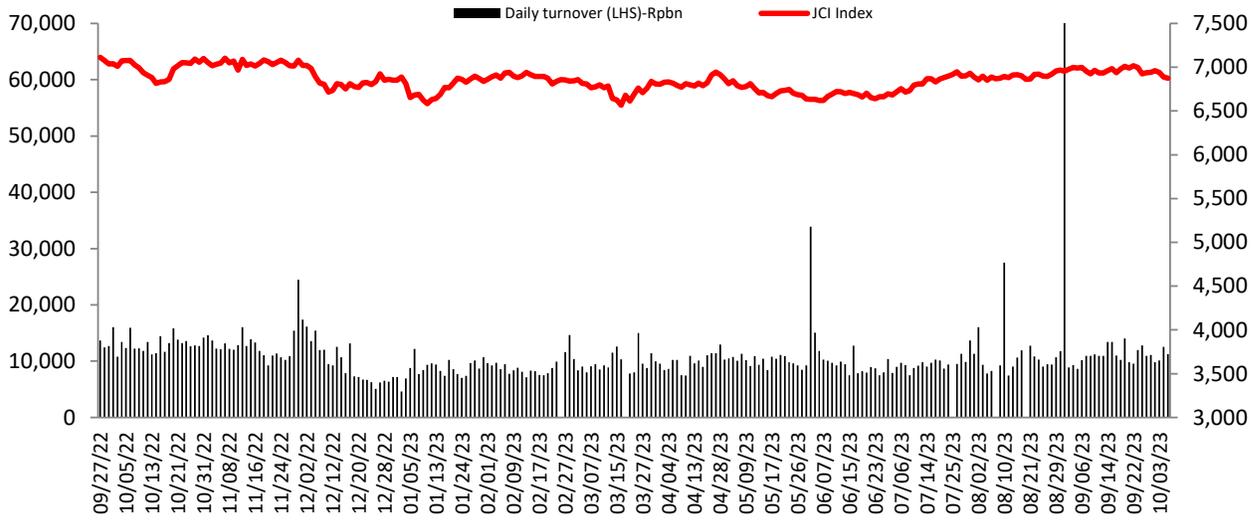
### BOND MARKET

#### Buying Interest

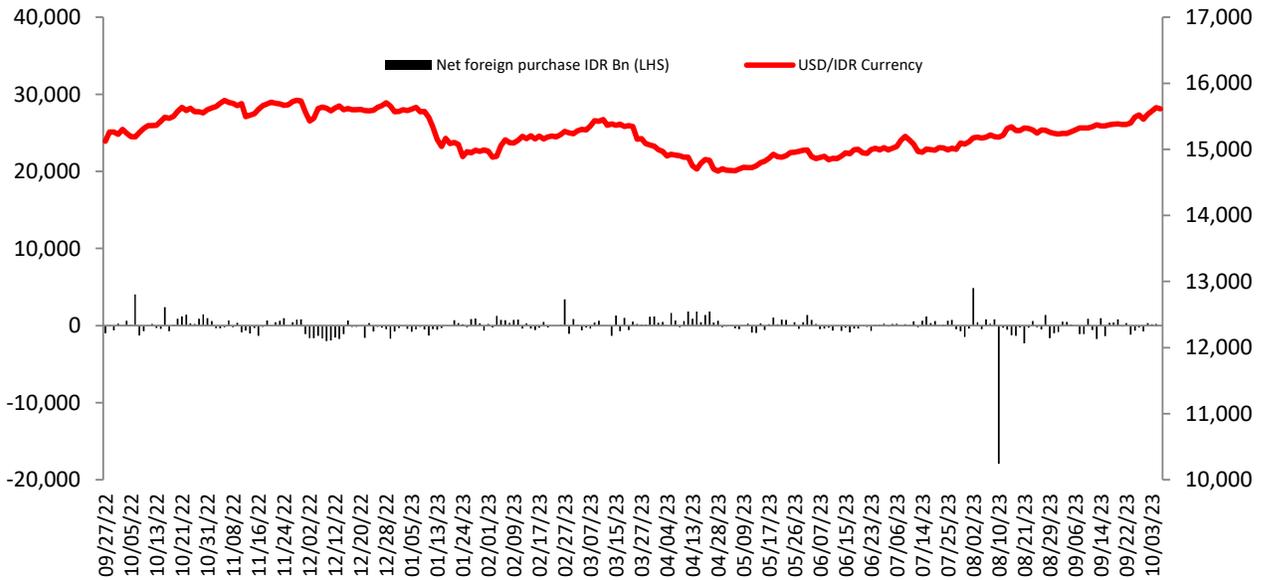
Indonesia bond market finally received buying interest today after USD ADP Jobs data last night. Selected buying was seen possibly due to short covering. The traded quickly lifted prices across the board as solid bids seen from mixed players. The sentiment, however, was capped by profit takers. Market trading was particularly active on 5Y and 10Y areas which remained as the market's favorite. Overall, yield lower by about 3 – 8 bps compared to yesterday closing.

# 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	95.4	0.0	(0.8)	5Y
FR91	FR0091 Govt	95.9	0.4	(0.5)	10Y
FR93	FR0093 Govt	94.4	0.5	(2.5)	15Y
FR92	FR0092 Govt	99.7	(0.2)	(0.6)	20Y
PBS036	INDOIS 5 ¼ 08/15/25	98.3	0.0	0.7	15-8-2025
PBS003	INDOIS 6 01/15/27	99.5	(0.0)	1.2	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.8	(0.0)		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.7	0.0	5.1	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,874.8	(0.2)	0.4	
Thailand	SET Index	1,445.7	(0.4)	(13.4)	
Korean Stock Exch.	KOSPI Index	2,403.6	(0.1)	7.5	
Straight Times	FSSTI Index	3,158.3	0.3	(2.9)	
Kuala Lumpur	KLCI Index	1,415.6	(0.0)	(5.3)	
Philippines	PCOMP Index	6,178.6	(1.9)	(5.9)	
Nikkei	NKY Index	31,075.4	1.8	19.1	
Hang Seng	HSI Index	17,213.9	0.1	(13.0)	
MSCI-Asia pacific	MXAP Index	152.3	(1.6)	(2.2)	
<u>Global Indices</u>					
Dow Jones	INDU Index	33,129.6	0.4	(0.1)	
S&P 500	SPX Index	4,263.8	0.8	11.0	
Nasdaq	CCMP Index	13,236.0	1.4	26.5	
FTSE 100	UKX Index	7,416.7	0.1	(0.5)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,615.0	0.1	(0.3)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,633.2	0.3	(0.6)
3 month	IDSWT3M Index	15,637.8	0.3	(0.4)
6 month	IDSWT6M Index	15,632.4	0.2	(0.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,639.4	0.2	(0.4)
6 month	IDFWT6M Index	15,609.5	0.6	0.2

\*price as of 10/4/2023

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