



FOR PROFESSIONAL INVESTORS - 11/11/2024

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Continuous Outflow

JCI slightly weakened and closed at 7,266 (-21 points or -0.28%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR -1.5Tn today and rupiah was stabilized at IDR 15,680/USD.

Banking stocks were mixed as BMRI (+0.4%) and PNB (+6.91%) inched higher, while BBTN (-2.26%), BBCA (-0.25%), and BBRI (-1.33%) retreated. Consumer names were mostly negative as HMSP (-0.73%), UNVR (-1.14%), ICBP (-1.24%), and KLBF (-1.95%) all closed lower, except INDF (+1.3%). Material stocks were negative as BRPT (-1.06%) and TPIA (-3.09%) all weakened. Telco names were negative as ISAT (-1.83%), EXCL (-3.17%), and TLKM (-2.18%) all declined. Other movers were DWGL (+34.19%), MLPT (+20%), DSSA (-9.05%), and PANI (-6.4%).

Indonesia secures an investment cooperation worth US\$10bn with China, during President Prabowo's visit to Beijing. The cooperation includes sustainable capture fisheries development, mineral resources, and water resources.

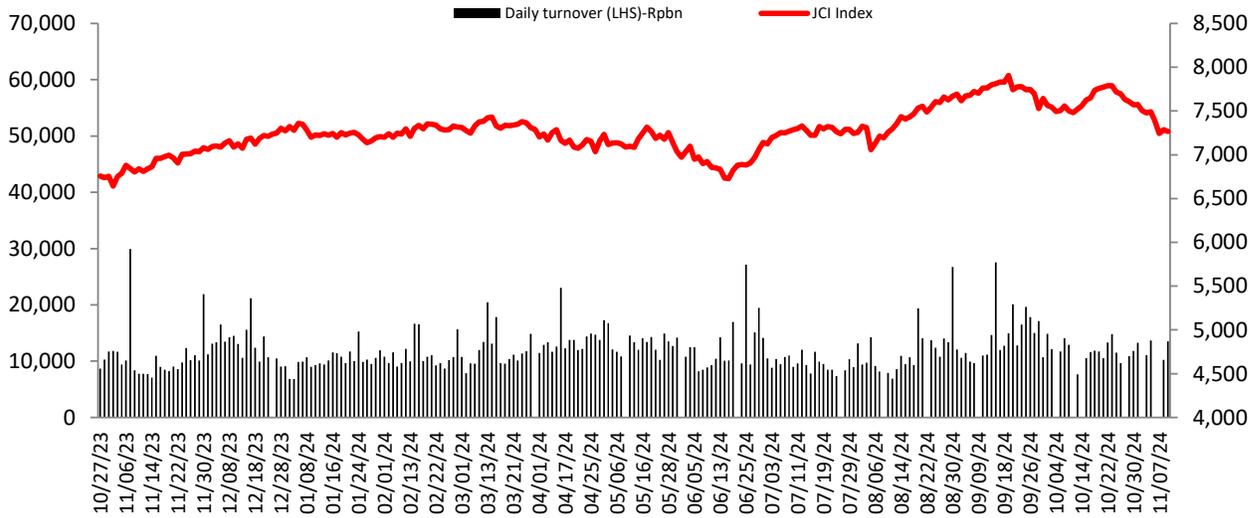
BOND MARKET

Uneventful

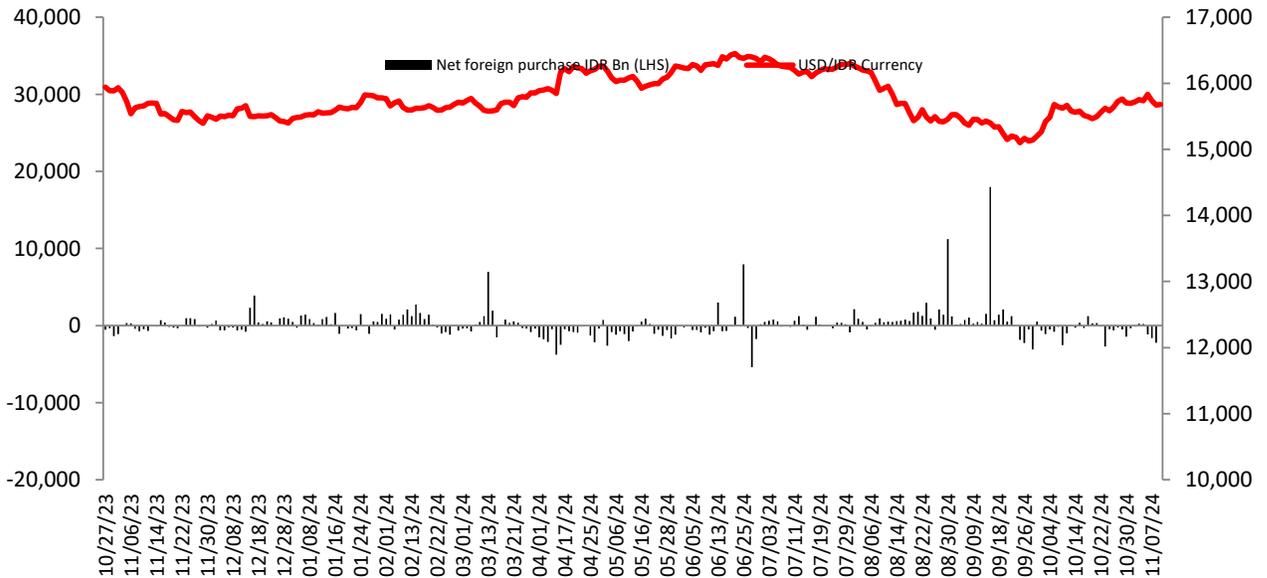
The bond market opened the week with buying interest seen in the 5Y tenor buckets. The 5Y FR101 and 5Y FR104 were traded at 101.5 (6.48%) and 99.75 (6.55%) in the morning session. However, selling pressure were seen in the belly area with 10Y FR103 last seen traded at 99.30 (6.84%) in what suspected to be an action freeing up space for tomorrow auction. Overall yield curve closed mixed with short tenor lower by 3-5bps while belly to long end higher by 2-5bps. Tomorrow, Debt Management Office ("DMO") will hold a conventional bond auction tomorrow with target of IDR 22tn comprising of 3mo SPN, 1Y SPN, 5Y FR104, 10Y FR103, 15Y FR98, 20Y FR97, 30Y FR102 and 40Y FR105

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	97.1	0.0	0.8	5Y
FR91	FR0091 Govt	98.3	0.0	(0.8)	10Y
FR93	FR0093 Govt	96.4	(0.0)	(1.8)	15Y
FR92	FR0092 Govt	101.6	(0.1)	(2.2)	20Y
PBS036	INDOIS 5 ¼ 08/15/25	99.4	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	100.6	(0.2)	0.3	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	7,266.5	(0.3)	(0.1)	
Thailand	SET Index	1,454.0	(0.7)	2.7	
Korean Stock Exch.	KOSPI Index	2,531.7	(1.2)	(4.7)	
Straight Times	FSSTI Index	3,736.4	0.3	15.3	
Kuala Lumpur	KLCI Index	1,609.3	(0.7)	10.6	
Philippines	PCOMP Index	6,940.0	(0.5)	7.6	
Nikkei	NKY Index	39,533.3	0.1	18.1	
Hang Seng	HSI Index	20,426.9	(1.5)	19.8	
MSCI-Asia pacific	MXAP Index	189.5	(0.0)	11.9	
<u>Global Indices</u>					
Dow Jones	INDU Index	43,989.0	0.6	16.7	
S&P 500	SPX Index	5,995.5	0.4	25.7	
Nasdaq	CCMP Index	19,286.8	0.1	28.5	
FTSE 100	UKX Index	8,127.5	0.7	5.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,680.0	(0.1)	(1.8)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,691.3	(0.5)	1.8
3 month	IDSWT3M Index	15,670.9	(0.6)	(1.4)
6 month	IDSWT6M Index	15,681.2	(0.5)	(1.7)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,684.5	(0.7)	(1.5)
6 month	IDFWT6M Index	15,741.1	(0.5)	(1.5)

*price as of 11/9/2024

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