

FOR PROFESSIONAL INVESTORS - 07/10/2024

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Pushing Higher

JCI slightly strengthened and closed at 7,287 (+17 points or +0.24%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 169n today and rupiah was stabilized at IDR 16,240/USD.

Banking stocks were mostly negative as PNB (-0.77%), BBTN (-0.77%), BBNI (-0.82%), and BBRI (-0.41%) all corrected, except BBKA (+0.25%). Consumer names were mostly negative as ICBP (-0.24%), MYOR (-0.82%), UNVR (-1.33%), and KLB (-1.29%) all closed lower, except INDF (+0.84%). Telco stocks were positive as TLKM (+2.6%), ISAT (+4.02%), and FREN (+3.33%) all closed higher. Material names were mixed as TPIA (+3.26%) closed higher, while BRPT unchanged. Other movers were BBKP (+9.26%), KIIA (+6.72%), INTP (-3.62%), and ARTO (-3.39%).

The government has officially decided to extend the US\$6 gas price regulation (HGBT) for seven selected sectors including fertiliser, petrochemical, oleo chemical, steel, ceramic, glass and rubber gloves. The Ministry of Industry is currently preparing a new regulation on the extension of the policy.

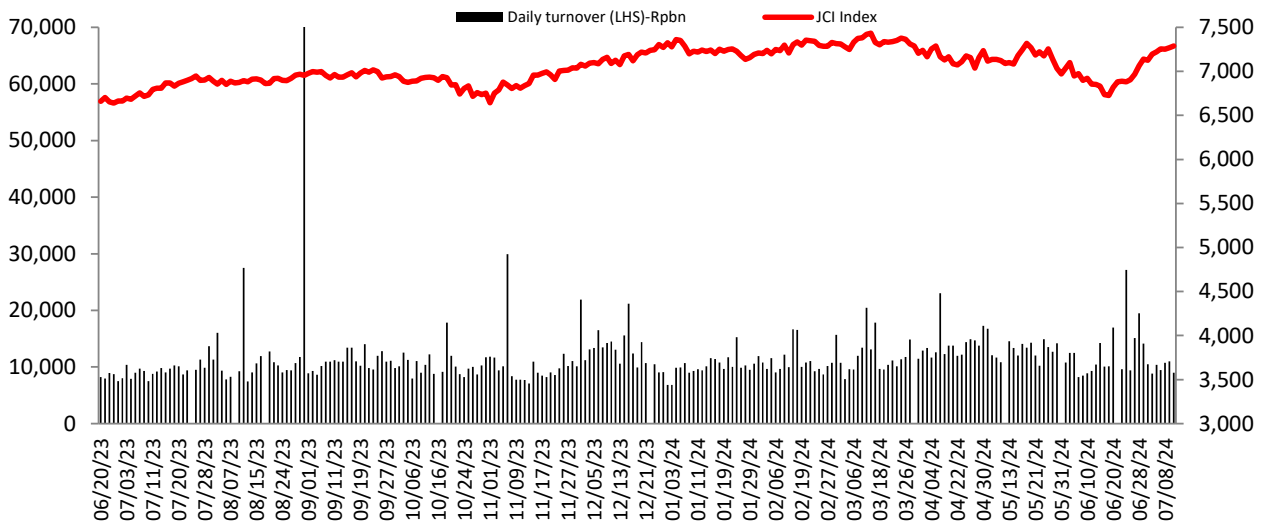
BOND MARKET

UNCHANGED SENTIMENT

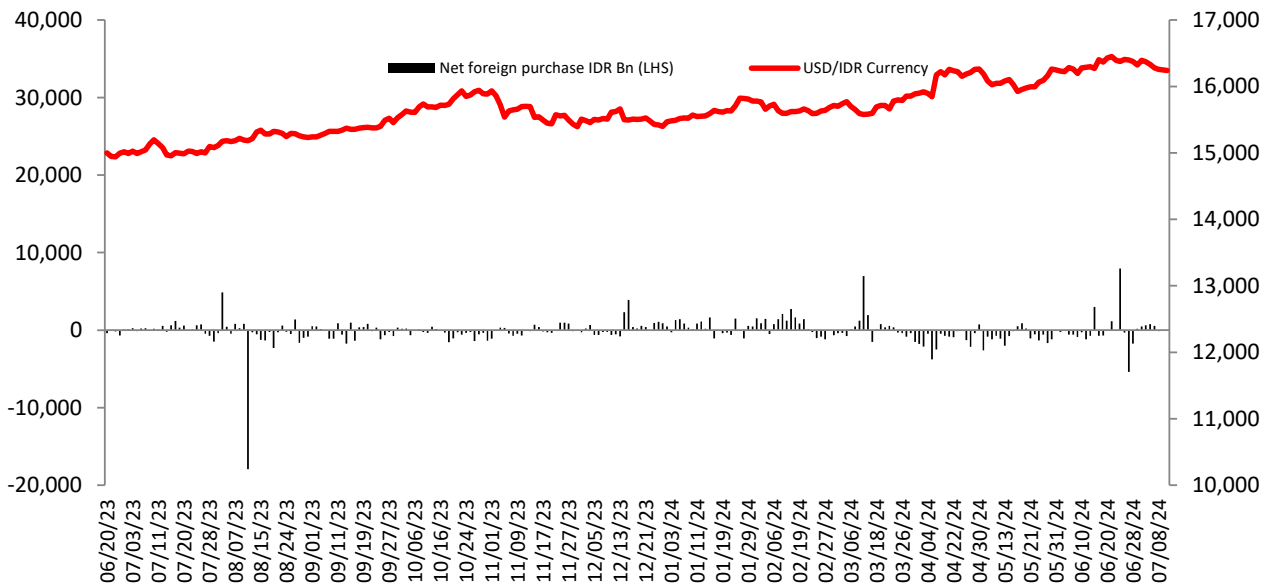
Indonesia bond market closed the day with unchanged sentiment. Market is still moving two ways in the morning session, although in the second session bond market was pretty quiet. Trading concentrated on front and middle maturities while the other part of the yield curve was quoted within range throughout the day. IDR bond prices ended the day unchanged from yesterday level. The 5Y/10Y/15Y/20Y benchmark closed the week at mid yield of 6.88%/7.02%/7.08%/7.11%. In SRBI auction today, incoming bid was higher than last, IDR 32.16Tn compare previous IDR 26Tn.

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	96.1	0.0	(0.2)	5Y
FR91	FR0091 Govt	96.4	0.0	(2.7)	10Y
FR93	FR0093 Govt	94.6	0.0	(3.6)	15Y
FR92	FR0092 Govt	100.3	0.0	(3.4)	20Y
PBS036	INDOIS 5 ¾ 08/15/25	98.4	(0.0)	0.3	15-8-2025
PBS003	INDOIS 6 01/15/27	98.1	#VALUE!	0.1	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.4	0.0	1.1	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	96.9	0.0	(1.9)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,287.0	0.2	0.2	
Thailand	SET Index	1,323.3	0.3	(6.5)	
Korean Stock Exch.	KOSPI Index	2,868.0	0.0	8.0	
Straight Times	FSSTI Index	3,459.9	1.0	6.8	
Kuala Lumpur	KLCI Index	1,618.4	0.2	11.3	
Philippines	PCOMP Index	6,489.4	(1.0)	0.6	
Nikkei	NKY Index	41,832.0	0.6	25.0	
Hang Seng	HSI Index	17,471.7	(0.3)	2.5	
MSCI-Asia pacific	MXAP Index	185.0	0.5	9.2	
<u>Global Indices</u>					
Dow Jones	INDU Index	39,292.0	(0.1)	4.3	
S&P 500	SPX Index	5,577.0	0.1	16.9	
Nasdaq	CCMP Index	18,429.3	0.1	22.8	
FTSE 100	UKX Index	8,185.2	0.6	5.8	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,240.0	0.1	(5.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,270.0	(0.0)	5.6
3 month	IDSWT3M Index	16,273.9	0.0	(5.3)
6 month	IDSWT6M Index	16,281.4	0.1	(5.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,293.8	0.1	(5.5)
6 month	IDFWT6M Index	16,317.7	0.1	(5.2)

*price as of 7/10/2024



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