



FOR PROFESSIONAL INVESTORS - 12/09/2024

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Rebound

JCI advanced and closed at 7,438 (+55 points or +0.74%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 296Bn today and rupiah was stabilized at IDR 15,865/USD.

Banking stocks were positive as BBKA (+2.73%), BMRI (+2.41%), BBRI (+1.86%), BBNI (+2.88%), and BBTN (+2.07%) all inched higher. Consumer names were mostly positive as INDF (+3.47%), KLBF (+1.37%), UNVR (+1.34%), and HMSP (+0.75%) all up, except ICBP (-0.42%). Material stocks were negative as BRPT (-2.09%) and TPIA (-4.9%) all retreated. Mining names were mostly positive as ADRO (+16.52%), PTBA (+0.73%), ITMG (+0.54%), and ANTM (+0.34%) all up, except INCO (-0.55%). Other movers were PANI (+5.88%), JPFA (+5.68%), AMRT (-4.23%), and MSIN (-3.09%).

Ministry of housing noted that the 3 million housing program would be funded by the state budget (APBN) and other sources such as banks and other stakeholders, and the instalment for the house would be about Rp600k per month or Rp7.2mn per year.

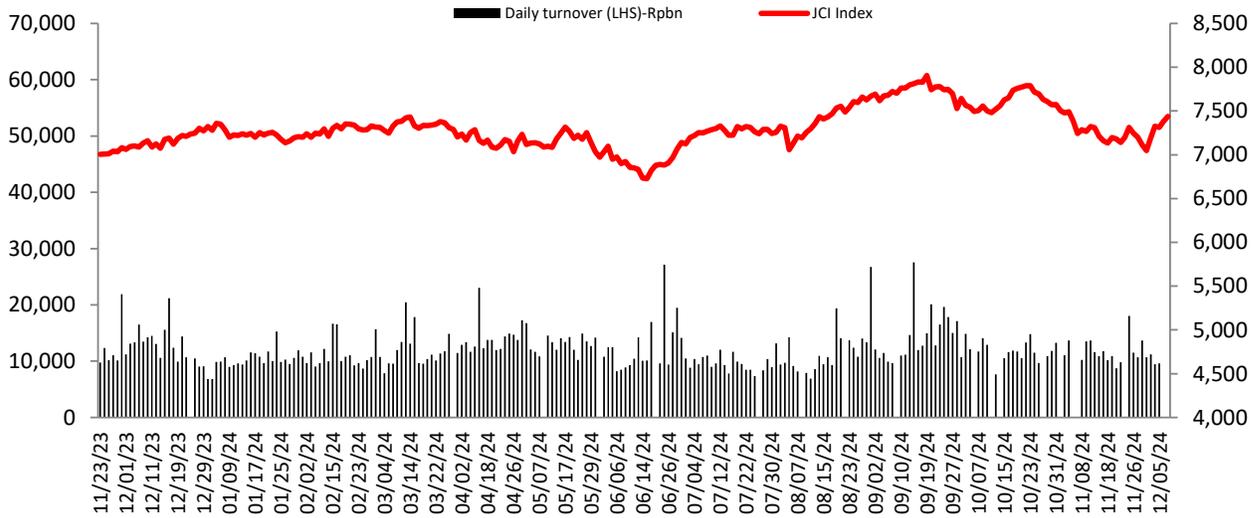
### BOND MARKET

#### QUIET

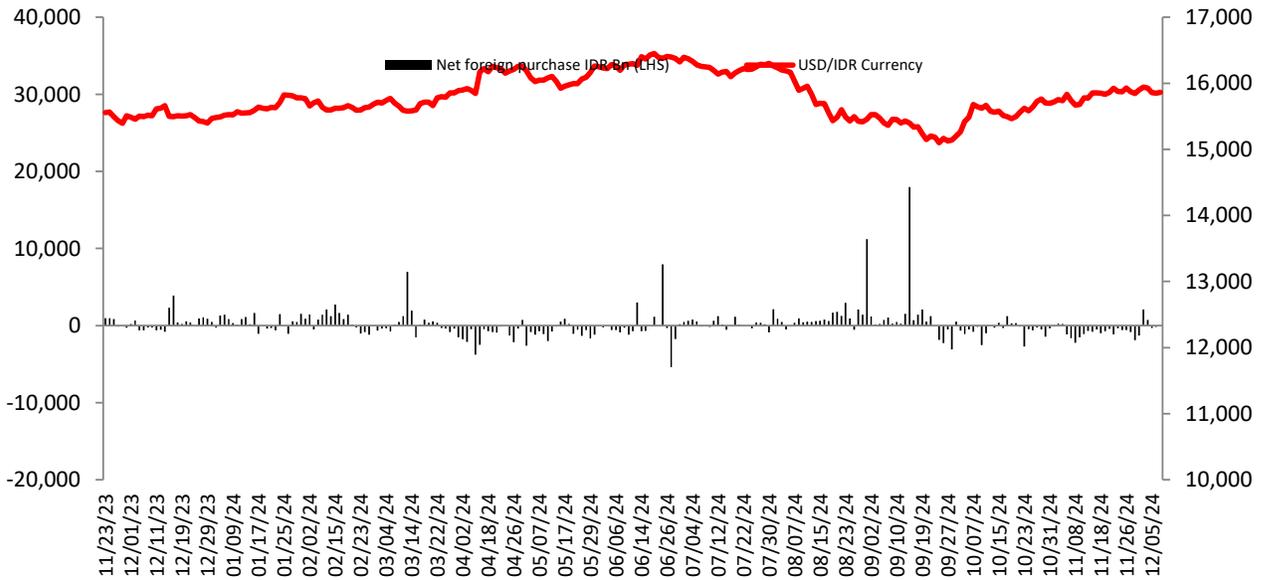
Indonesia start the week relatively unchanged compare to last Friday closing. In the morning session, market was pretty much mute and bonds remained rangy. Trading was more lively in the afternoon session as soon as London market opened. We heard some onshore players showing their appetite across the curve with regular clips. Tomorrow, Dec 10th, Indonesia Debt Management Office ("DMO") will hold conventional bond auction with IDR 22Tn issuance target. In the previous conventional auction, incoming bids reached IDR 29.105Tn and DMO issued IDR 20.3Tn.

# 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	96.3	(0.0)	0.0	5Y
FR91	FR0091 Govt	97.1	0.0	(2.0)	10Y
FR93	FR0093 Govt	95.8	(0.1)	(2.4)	15Y
FR92	FR0092 Govt	100.5	0.1	(3.2)	20Y
PBS036	INDOIS 5 ¼ 08/15/25	99.5	0.0	1.4	15-8-2025
PBS003	INDOIS 6 01/15/27	98.8	(0.0)	0.5	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.8	(0.0)	0.5	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.0	(0.1)	(0.8)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,437.7	0.7	2.3	
Thailand	SET Index	1,446.4	(0.4)	2.2	
Korean Stock Exch.	KOSPI Index	2,360.6	(2.8)	(11.1)	
Straight Times	FSSTI Index	3,794.9	(0.0)	17.1	
Kuala Lumpur	KLCI Index	1,611.4	(0.1)	10.8	
Philippines	PCOMP Index	6,680.6	(0.7)	3.6	
Nikkei	NKY Index	39,160.5	0.2	17.0	
Hang Seng	HSI Index	20,414.1	2.8	19.7	
MSCI-Asia pacific	MXAP Index	186.9	(0.0)	10.3	
<u>Global Indices</u>					
Dow Jones	INDU Index	44,642.5	(0.3)	18.4	
S&P 500	SPX Index	6,090.3	0.2	27.7	
Nasdaq	CCMP Index	19,859.8	0.8	32.3	
FTSE 100	UKX Index	8,330.4	0.3	7.7	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,865.0	(0.1)	(2.9)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,855.0	(0.1)	2.9
3 month	IDSWT3M Index	15,844.7	(0.3)	(2.6)
6 month	IDSWT6M Index	15,850.1	(0.1)	(2.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,861.0	(0.3)	(2.7)
6 month	IDFWT6M Index	15,949.2	0.0	(2.8)

\*price as of 12/9/2024

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