

FOR PROFESSIONAL INVESTORS - 11/13/2023

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

RECOVERED

JCI slightly strengthened and closed at 6,838 (+29 points or +0.43%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 108Bn today and rupiah was stabilized at IDR 15,700/USD.

Banking stocks were mostly positive as BMRI (+0.87%), BBKA (+0.57%), BBNI (+0.62%), and MEGA (+0.95%) all rose, except BBRI (-0.99%). Consumer names were mixed as INDF (+1.98%) and KLBF (+0.63%) rose, while HMSP (-1.52%), UNVR (-1.67%), and ICBP (-1.89%) corrected. Pulp & paper stocks were positive as INKP (+3.24%) and TKIM (+1.32%) all inched higher. Material names were negative as BRPT (-2.13%) and TPIA (-3%) all corrected. Other movers were FILM (+17.81%), PANI (+5.3%), ARTO (-5.34%), and AUTO (-4.53%).

A nationwide survey by Bank Indonesia (BI) has found that the consumer confidence index (CCI) strengthened in October after dipping in the previous month. The index reading was 124.3 last month, higher than the 121.7 logged in September, according to the survey published on Wednesday.

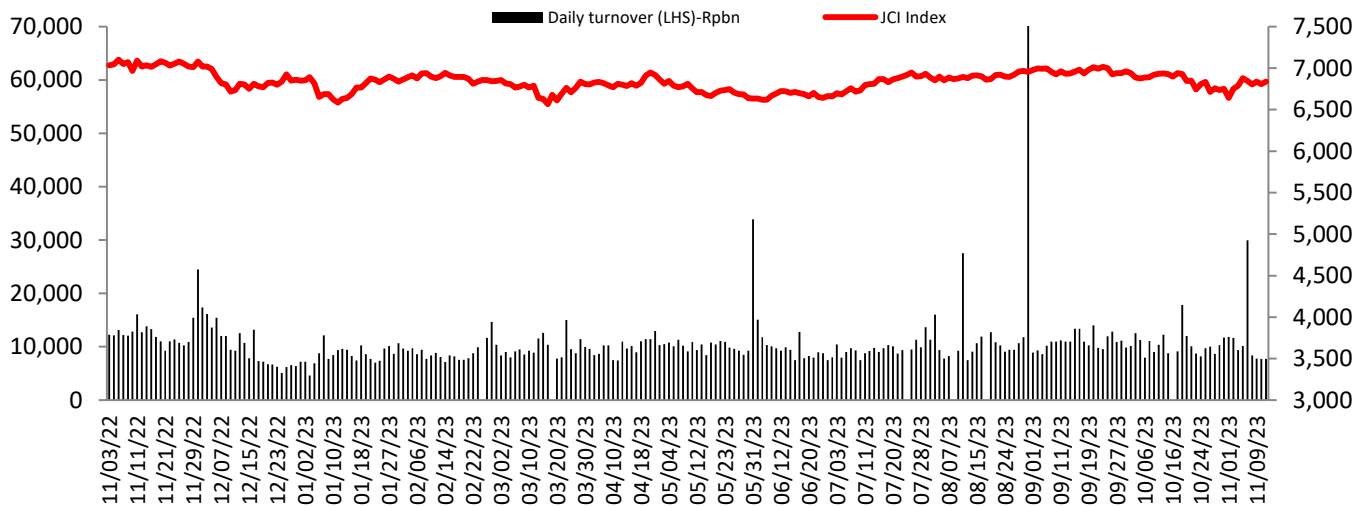
BOND MARKET

SOFTER

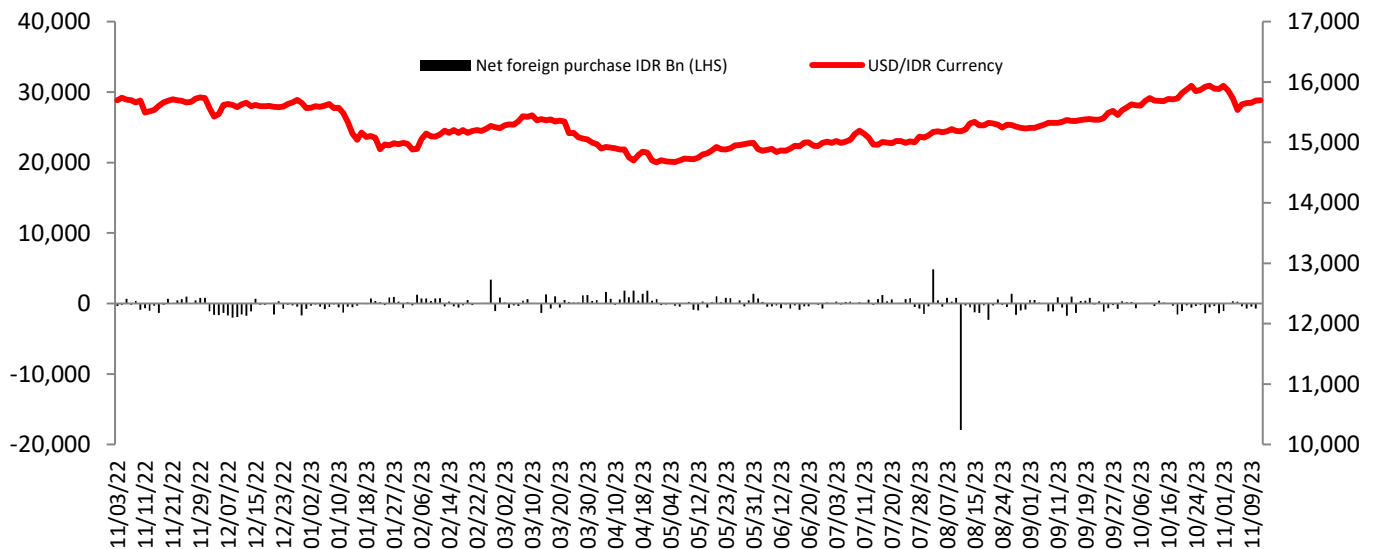
Indonesia bond market traded softer today ahead of conventional auction and US CPI data tomorrow. The market opened quiet with little to no trades heard on our side, but heard some selling in the afternoon in what looks like freeing up space for tomorrow auction. The most traded bonds today, 10Y FR96 were traded to 6.91% while 8Y FR87 were traded to 7.09%. Overall yield curve closed higher by 4-9 bps. Tomorrow, MoF would held conventional auction with issuance target of IDR 19tn (max: IDR 28.5tn). The series offered tomorrow are 3mo SPN, 12mo SPN, 5Y FR101, 10Y FR100, 15Y FR98, 20Y FR97, and 28Y FR89.

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	96.7	0.0	0.3	10Y
FR93	FR0093 Govt	95.3	0.0	(1.0)	15Y
FR92	FR0092 Govt	100.6	(0.1)	0.3	20Y
PBS036	INDOIS 5 ¾ 08/15/25	97.6	0.0	(0.0)	15-8-2025
PBS003	INDOIS 6 01/15/27	98.2	0.0	0.2	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	98.8	0.1		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	95.8	0.0	1.8	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,838.3	0.4	(0.2)	
Thailand	SET Index	1,385.5	(0.3)	(17.0)	
Korean Stock Exch.	KOSPI Index	2,403.8	(0.2)	7.5	
Straight Times	FSSTI Index	3,106.7	(0.9)	(4.4)	
Kuala Lumpur	KLCI Index	1,445.2	(0.5)	(3.4)	
Philippines	PCOMP Index	6,116.1	(0.7)	(6.9)	
Nikkei	NKY Index	32,585.1	0.1	24.9	
Hang Seng	HSI Index	17,426.2	1.3	(11.9)	
MSCI-Asia pacific	MXAP Index	155.9	(0.9)	0.1	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,283.1	1.2	3.4	
S&P 500	SPX Index	4,415.2	1.6	15.0	
Nasdaq	CCMP Index	13,798.1	2.0	31.8	
FTSE 100	UKX Index	7,415.9	0.8	(0.5)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,700.0	(0.0)	(0.8)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,692.1	0.2	(0.2)
3 month	IDSWT3M Index	15,688.8	0.2	(0.7)
6 month	IDSWT6M Index	15,699.6	0.3	(0.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,706.1	0.3	(0.9)
6 month	IDFWT6M Index	15,720.0	0.4	(0.5)

*price as of 11/10/2023

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