

FOR PROFESSIONAL INVESTORS - 11/09/2023

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Lower Again

JCI weakened and closed at 6,804 (-40 points or -0.58%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 731Bn today and rupiah slightly weakened to IDR 15,650/USD.

Banking stocks were mostly negative as MEGA (-0.47%), BBNI (-1.21%), BMRI (-0.43%), and BBRI (-0.48%) all weakened, except BBKA (+0.28%). Consumer names were mixed as KLBF (+0.62%) and UNVR (+0.84%) advanced, while INDF (-0.39%), HMSP (-1.55%), and GGRM (-3.33%) down. Infra stocks were negative as JSRM (-0.23%), TBIG (-0.49%), TOWR (-1.04%), and PGAS (-5.79%) all down. Mining names were negative as PTBA (-1.27%), INCO (-2.43%), ITMG (-2.47%), ANTM (-1.78%), and ADRO (-1.21%) all down. Other movers were FILM (+7.08%), STTP (+6.67%), MDKA (-5.98%), and MEDC (-5.53%).

Indo forex reserve slightly declined by 1.3% MoM (-US\$1.8bn) to US\$133bn in Oct-23. This is equivalent to financing 6.1 months of imports or 5.9 months of imports and servicing the gov't's external debt.

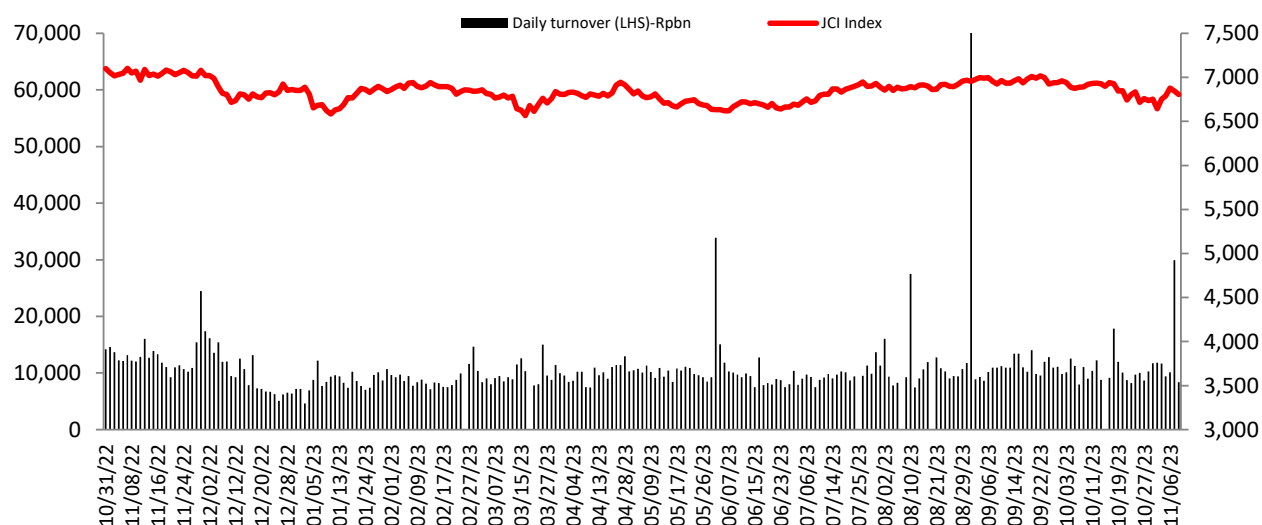
BOND MARKET

QUIET MARKET

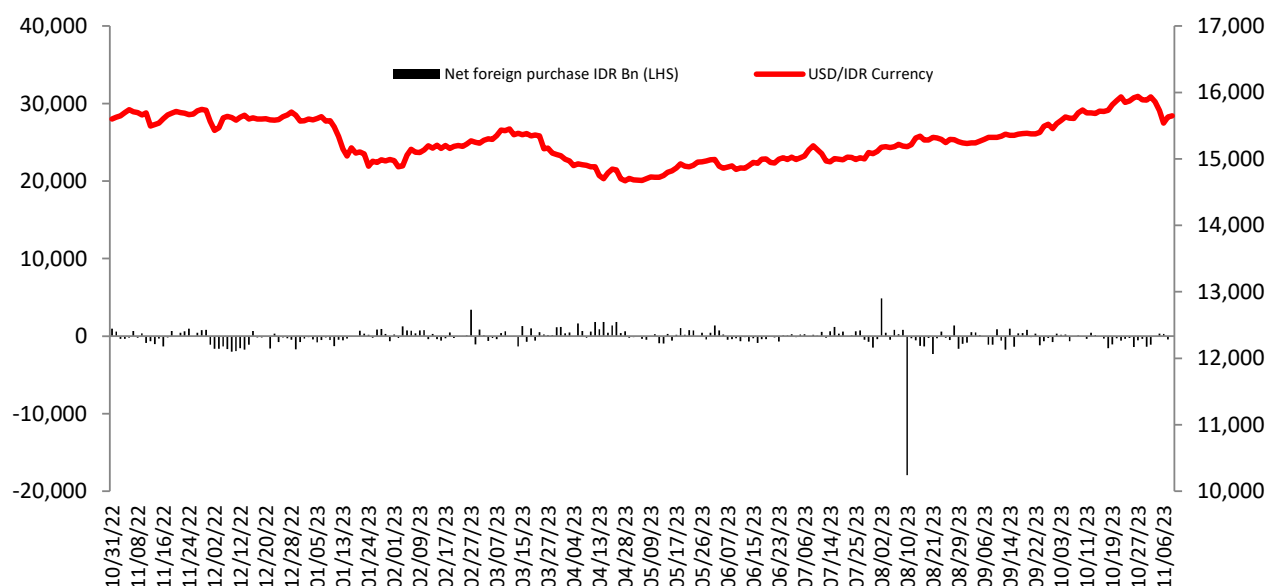
Indonesia bond market was calm today. Only few trades were seen throughout the day with light trading volume. Although the overall market tone was mixed, no significant price action took place. IDR bond the prices ended the day relatively unchanged from yesterday level. The yield of 5/10/15/20Y benchmark closed the day at mid-yield of 6.71%/6.79%/6.90%/7.02% respectively

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	95.5	(0.0)	(0.7)	5Y
FR91	FR0091 Govt	97.2	(0.2)	0.9	10Y
FR93	FR0093 Govt	95.2	0.2	(1.7)	15Y
FR92	FR0092 Govt	101.0	0.0	0.6	20Y
PBS036	INDOIS 5 ½ 08/15/25	97.8	0.0	0.2	15-8-2025
PBS003	INDOIS 6 01/15/27	98.1	0.1	0.1	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	98.4	0.0		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	95.6	0.2	1.6	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,804.1	(0.6)	(0.7)	
Thailand	SET Index	1,411.8	0.2	(15.4)	
Korean Stock Exch.	KOSPI Index	2,421.6	(0.9)	8.3	
Straight Times	FSSTI Index	3,129.7	(1.4)	(3.7)	
Kuala Lumpur	KLCI Index	1,457.6	(0.4)	(2.5)	
Philippines	PCOMP Index	6,155.0	0.4	(6.3)	
Nikkei	NKY Index	32,166.5	(0.3)	23.3	
Hang Seng	HSI Index	17,568.5	(0.6)	(11.2)	
MSCI-Asia pacific	MXAP Index	157.6	(1.3)	1.2	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,152.6	0.2	3.0	
S&P 500	SPX Index	4,378.4	0.3	14.0	
Nasdaq	CCMP Index	13,639.9	0.9	30.3	
FTSE 100	UKX Index	7,407.2	(0.0)	(0.6)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,650.0	(0.1)	(0.5)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,616.5	0.5	(0.7)
3 month	IDSWT3M Index	15,593.4	(1.1)	(0.1)
6 month	IDSWT6M Index	15,625.0	0.4	(0.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,607.7	0.3	(0.2)
6 month	IDFWT6M Index	15,559.0	(2.0)	0.5

*price as of 11/7/2023


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* PT BNP Asset Management (address: Sequis Tower, 29th Floor, Jl. Jend. Sudirman Kav. 71, SCBD Lot 11B, Jakarta 12190 - INDONESIA).

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