



FOR PROFESSIONAL INVESTORS - 08/01/2024

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Rally

JCI advanced and closed at 7,326 (+70 points or +0.97%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 897Bn today and rupiah slightly strengthened to IDR 16,235/USD.

Banking stocks were mostly positive as BMRI (+5.47%), BBR1 (+1.71%), BBCA (+0.97%), and BBNI (+2.11%) all up, except MEGA (-1.46%). Consumer names were mixed as KLBF (+3.77%), UNVR (+2.46%), and ICBP (+0.69%) closed higher, while GGRM (-2.22%) and MYOR (-3.07%) down. Properties stocks were positive as PWON (+3.76%), LPKR (+7.94%), SMRA (+3.57%), and CTRA (+0.4%) all advanced. Material names were positive as TPIA (+1.81%) and BRPT (+2.75%) all up. Other movers were MAPA (+6.17%), BFIN (+5.03%), MNCN (-7.78%), and ISAT (-3.6%).

Ministry of Energy and Mineral Resources carries out stratification of electricity tariffs or widening of power limits in several PLN electricity tariff categories. Several tariff categories affected are traction, bulk, business and household.

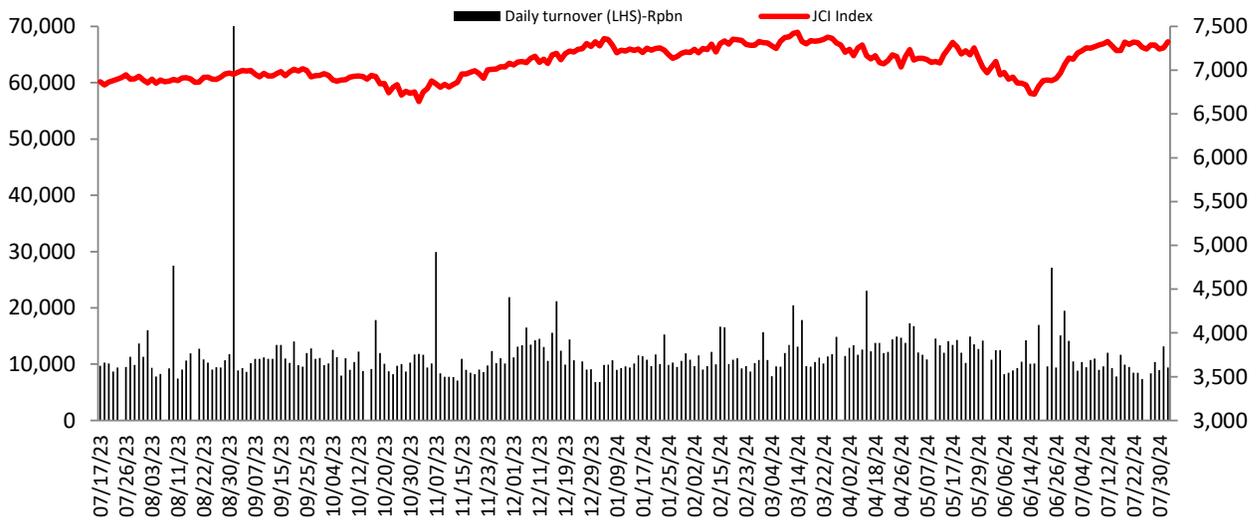
BOND MARKET

AFTER THE FED

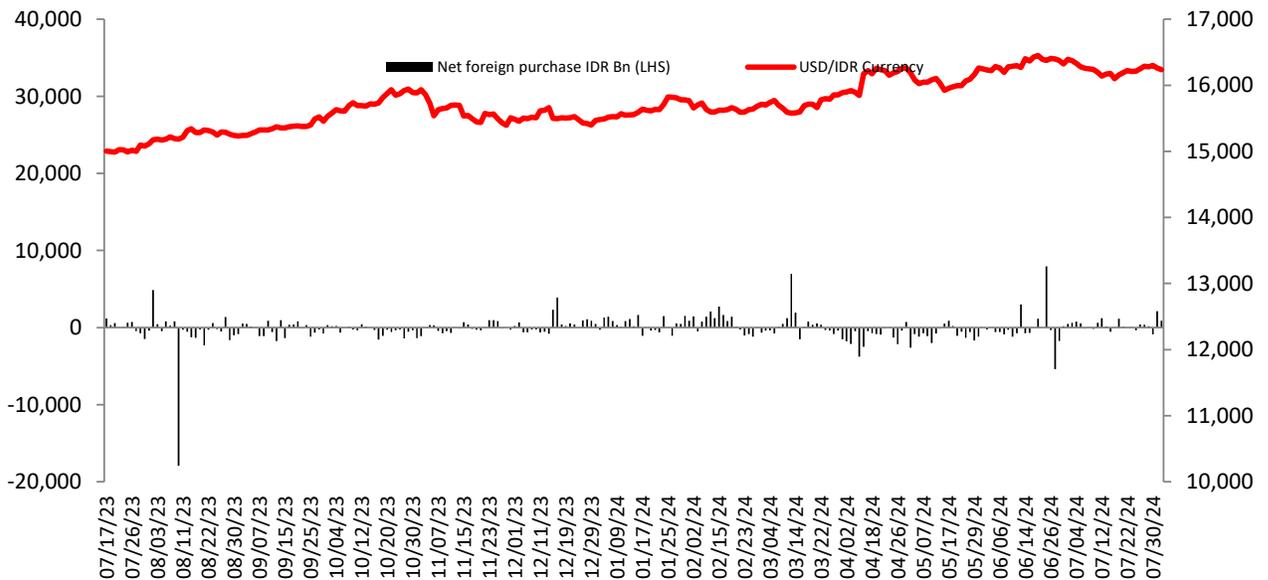
Post FOMC statement overnight, Indonesia bond market started the day with biddish tone. Today's activities seemed to be centered around 10-15Y area, while the other part of the yield curve was quoted within range. Offshore buying flows which were matched with interbank profit taking actions. At the end of the day, bonds yield closed 3 to 7 bps lower. The benchmark series of 5, 10, 15 and 20Y closed at mid-yield of 6.69%, 6.83%, 6.95% and 7.01% 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	96.4	0.1	0.1	5Y
FR91	FR0091 Govt	97.3	0.1	(1.7)	10Y
FR93	FR0093 Govt	96.3	0.1	(1.9)	15Y
FR92	FR0092 Govt	100.6	0.1	(3.1)	20Y
PBS036	INDOIS 5 ¾ 08/15/25	98.8	0.1	0.7	15-8-2025
PBS003	INDOIS 6 01/15/27	98.3	(0.1)	0.3	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.5	0.0	0.1	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.2	1.5	(0.6)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,326.0	1.0	0.7	
Thailand	SET Index	1,322.8	0.1	(6.6)	
Korean Stock Exch.	KOSPI Index	2,777.7	0.3	4.6	
Straight Times	FSSTI Index	3,419.8	(1.0)	5.5	
Kuala Lumpur	KLCI Index	1,624.3	(0.1)	11.7	
Philippines	PCOMP Index	6,693.8	1.1	3.8	
Nikkei	NKY Index	38,126.3	(2.5)	13.9	
Hang Seng	HSI Index	17,305.0	(0.2)	1.5	
MSCI-Asia pacific	MXAP Index	183.6	2.2	8.4	
<u>Global Indices</u>					
Dow Jones	INDU Index	40,842.8	0.2	8.4	
S&P 500	SPX Index	5,522.3	1.6	15.8	
Nasdaq	CCMP Index	17,599.4	2.6	17.2	
FTSE 100	UKX Index	8,376.2	0.1	8.3	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,235.0	0.2	(5.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,294.4	(0.1)	5.7
3 month	IDSWT3M Index	16,293.8	(0.2)	(5.5)
6 month	IDSWT6M Index	16,295.0	(0.1)	(5.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,312.7	(0.1)	(5.6)
6 month	IDFWT6M Index	16,353.7	(0.1)	(5.4)

*price as of 8/1/2024

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