

FOR PROFESSIONAL INVESTORS - 10/21/2024

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Slightly Higher

JCI slightly strengthened and closed at 7,773 (+13 points or +0.16%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 322Bn today and rupiah slightly weakened to IDR 15,495/USD.

Banking stocks were mixed as BBRI (+0.4%), BMRI (+0.35%), and MEGA (+0.6%) rose, while BBNI (-0.44%) and BBKA (-0.7%) weakened. Consumer names were negative as MYOR (-0.37%), SIDO (-1.49%), INDF (-0.34%), ICBP (-2.34%), and KLBF (-3.21%) all retreated. Material stocks were negative as BRPT (-0.49%) and TPIA (-0.28%) all down. Mining names were mixed as ANTM (+4%), INCO (+3.16%), and TINS (+1.87%) up, while PTBA (-0.98%) and ADRO (-1.06%) down. Other movers were INPC (+30.56%), EMTK (+15.3%), STTP (-5.02%), and FREN (-3.57%).

President Prabowo Subianto has announced the 2024-2029 cabinet line-up consisting of 53 ministers/heads of agencies under the name 'Kabinet Merah Putih'. Some key names include Minister of Finance Sri Mulyani, Minister of State-Owned Enterprises Erick Thohir, Minister of Investment Rosan Roeslani, and Minister of Energy and Mineral Resources Bahlil Lahadalia.

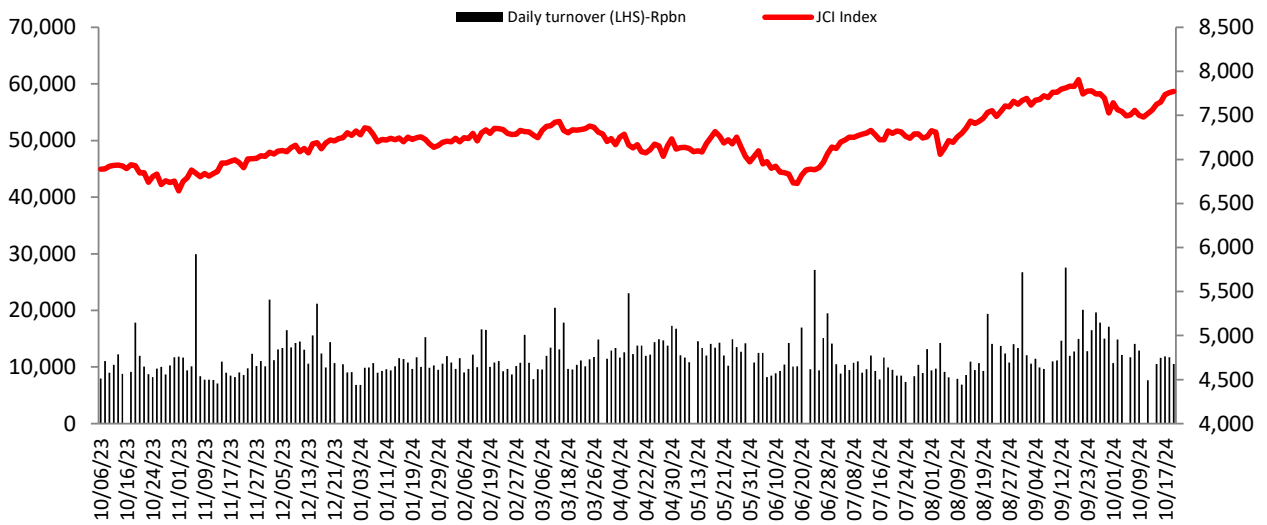
### BOND MARKET

#### TWO WAY INTEREST

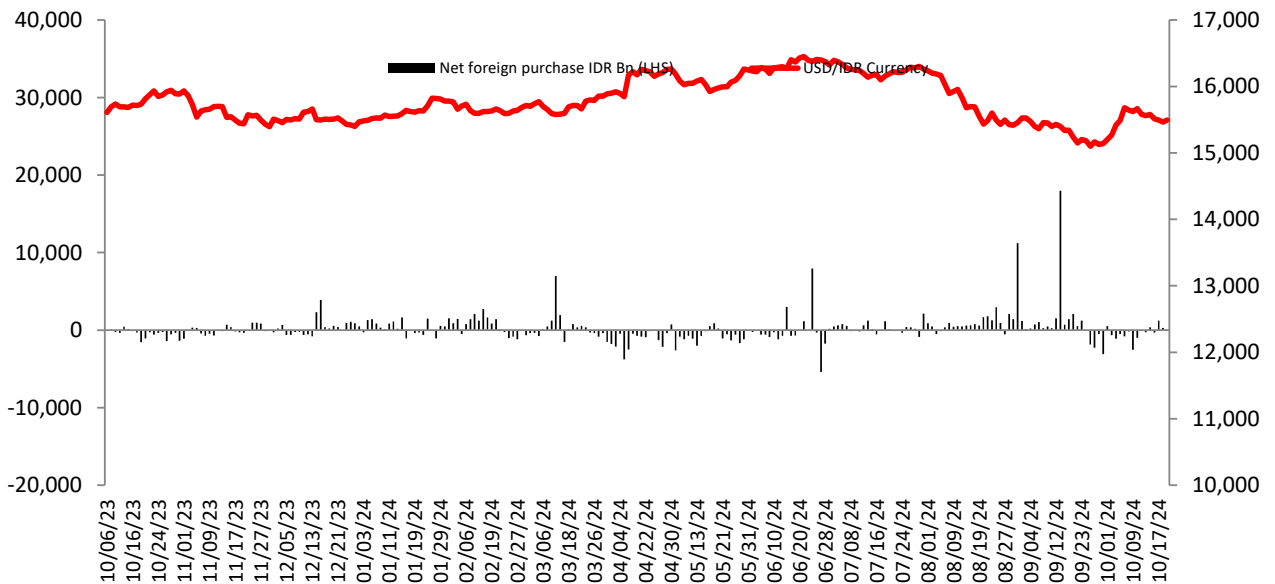
The mixed sentiment was seen in the bond market today with the bond price opened around the same level as last Friday closing. Market saw mixed flow during the day as investor interest focused on belly series, especially on non-benchmark series. Prices moved in tight range with overall biddish market tone was dominated by onshore names while offshore names tried to book profit. The 5Y/10Y yield higher by about 3 – 4 bps compared to last Friday closing, while the rest of the curved moved up by 1 - 2 bps.

## 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	97.4	0.1	1.2	5Y
FR91	FR0091 Govt	99.3	(0.0)	0.3	10Y
FR93	FR0093 Govt	97.1	(0.3)	(1.1)	15Y
FR92	FR0092 Govt	102.3	0.0	(1.5)	20Y
PBS036	INDOIS 5 ¾ 08/15/25	99.4	0.0	1.4	15-8-2025
PBS003	INDOIS 6 01/15/27	99.2	0.0	1.3	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.9	0.0	0.5	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.0	0.0	0.2	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,772.6	0.2	6.9	
Thailand	SET Index	1,488.0	(0.1)	5.1	
Korean Stock Exch.	KOSPI Index	2,604.9	0.4	(1.9)	
Straight Times	FSSTI Index	3,614.6	(0.7)	11.6	
Kuala Lumpur	KLCI Index	1,645.7	(0.0)	13.1	
Philippines	PCOMP Index	7,406.6	(0.1)	14.8	
Nikkei	NKY Index	38,954.6	(0.1)	16.4	
Hang Seng	HSI Index	20,478.5	(1.6)	20.1	
MSCI-Asia pacific	MXAP Index	191.4	1.2	13.0	
<u>Global Indices</u>					
Dow Jones	INDU Index	43,275.9	0.1	14.8	
S&P 500	SPX Index	5,864.7	0.4	23.0	
Nasdaq	CCMP Index	18,489.6	0.6	23.2	
FTSE 100	UKX Index	8,361.1	0.0	8.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,495.0	(0.2)	(0.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,462.0	(0.5)	0.3
3 month	IDSWT3M Index	15,472.9	(0.3)	(0.2)
6 month	IDSWT6M Index	15,461.1	(0.4)	(0.2)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,486.8	(0.3)	(0.3)
6 month	IDFWT6M Index	15,521.3	(0.2)	(0.0)

\*price as of 10/19/2024



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

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