

FOR PROFESSIONAL INVESTORS - 12/04/2024

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Extended Rally

JCI advanced and closed at 7,327 (+131 points or +1.82%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 744Bn today and rupiah was stabilized at IDR 15,930/USD.

Banking stocks were mixed as BBRI (+2.59%), BMRI (+1.59%), and BBNI (+3.56%) in green, while PNB (-4.04%) and MEGA (-2.35%) weakened. Consumer names were mostly positive as INDF (+0.96%), GGRM (+5.33%), UNVR (+1.87%), and MYOR (+1.46%) all advanced, except ICBP (-1.05%). Material stocks were positive as TPIA (+8.6%) and BRPT (+6.94%) all in green. Poultry names were positive as CPIN (+5.06%), JPFA (+3.13%), and MAIN (+3.14%) all rose. Other movers were BSIM (+9.86%), SMGR (+4.56%), JIHD (-24.88%), and LIFE (-7.17%).

Ministry of public works is requesting for additional budget of Rp60.6tn for the annual year of 2025, which would be allocated mainly for the development of Nusantara capital city (IKN) and Papua new autonomy region. The ministry plan to allocated Rp14.9tn out of the additional budget for IKN project.

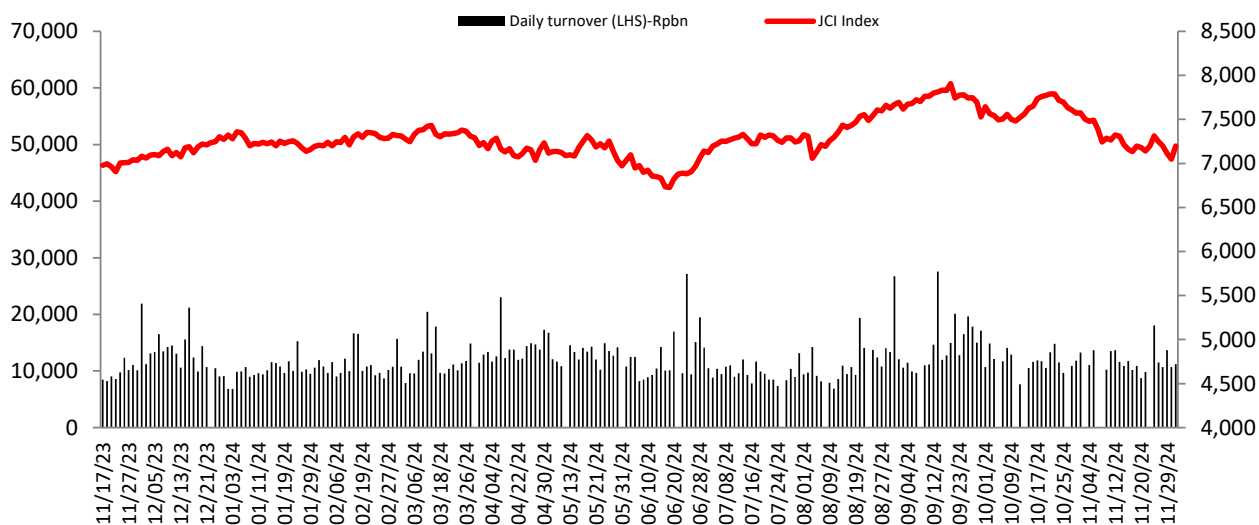
BOND MARKET

Within Range

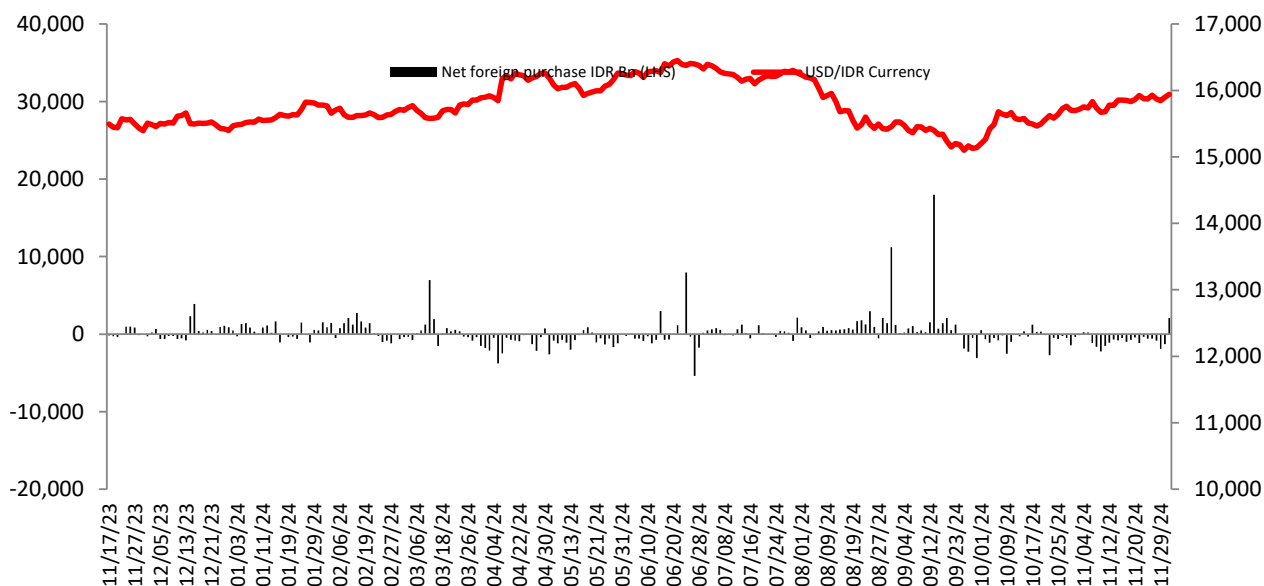
Indonesia bond market was calm today despite IDR get pressured with traded near 16,000. Only few trades were seen throughout the day with light trading volume. We still heard intervention done in the market by BI, as an effort to stabilize bond market. Although the overall market tone was mixed, FR100 and FR101's yield both traded higher 5 bps and closed at 6.91% and 6.84%.. IDR bond the prices ended the day slightly lower from yesterday level. Overall yield higher around 2–4 bps. The yield of 5/10/15/20Y benchmark closed the day at mid-yield of 6.82%/6.9%/7%/7.1% 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	97.2	(0.0)	(1.9)	10Y
FR93	FR0093 Govt	95.8	(0.2)	(2.4)	15Y
FR92	FR0092 Govt	100.4	(0.0)	(3.3)	20Y
PBS036	INDOIS 5 ¾ 08/15/25	99.5	0.0	1.4	15-8-2025
PBS003	INDOIS 6 01/15/27	99.4	0.0	1.2	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.6	(0.2)	0.3	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.1	0.1	(0.7)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,326.8	1.8	0.7	
Thailand	SET Index	1,451.5	(0.2)	2.5	
Korean Stock Exch.	KOSPI Index	2,464.0	(1.4)	(7.2)	
Straight Times	FSSTI Index	3,799.9	0.4	17.3	
Kuala Lumpur	KLCI Index	1,614.1	0.4	11.0	
Philippines	PCOMP Index	6,730.0	(0.1)	4.3	
Nikkei	NKY Index	39,276.4	0.1	17.4	
Hang Seng	HSI Index	19,742.5	(0.0)	15.8	
MSCI-Asia pacific	MXAP Index	187.6	1.4	10.8	
<u>Global Indices</u>					
Dow Jones	INDU Index	44,705.5	(0.2)	18.6	
S&P 500	SPX Index	6,049.9	0.0	26.8	
Nasdaq	CCMP Index	19,480.9	0.4	29.8	
FTSE 100	UKX Index	8,340.3	(0.2)	7.8	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,930.0	0.1	(3.3)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,944.1	0.3	3.4
3 month	IDSWT3M Index	15,950.3	0.3	(3.2)
6 month	IDSWT6M Index	15,950.0	0.6	(3.4)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,966.4	0.3	(3.4)
6 month	IDFWT6M Index	15,997.0	0.2	(3.1)

*price as of 12/4/2024



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