

FOR PROFESSIONAL INVESTORS - 09/23/2024

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Rebound

JCI slightly strengthened and closed at 7,776 (+33 points or +0.42%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 1.2Tn today and rupiah slightly weakened to IDR 15,200/USD.

Banking stocks were positive as BBRI (+2.33%), BMRI (+2.05%), BBKA (+1.62%), BBNI (+0.87%), and PNBK (+7.53%) all rose. Consumer names were mostly positive as HMSP (+9.7%), ICBP (+1.67%), KLBF (+0.87%), and UNVR (+1.84%) all inched higher, except INDF (-0.7%). Mining stocks were positive as PTBA (+5.76%), ANTM (+1.82%), INDY (+7.48%), ADRO (+0.27%), and ITMG (+1.06%) all advanced. Material names were positive as TPIA (+8.39%) and BRPT (+0.94%) all advanced. Other movers were BRMS (+12%), BUMI (+6.9%), LIFE (-8.95%), and FREN (-7.41%).

Ministry of Energy and Mineral Resources stated that as of 18Sept2024, national coal production is at 563mn ton with export realization of 284mn ton and DMO of 250mn ton. This year, government targets 922mn ton coal production (61% realized)

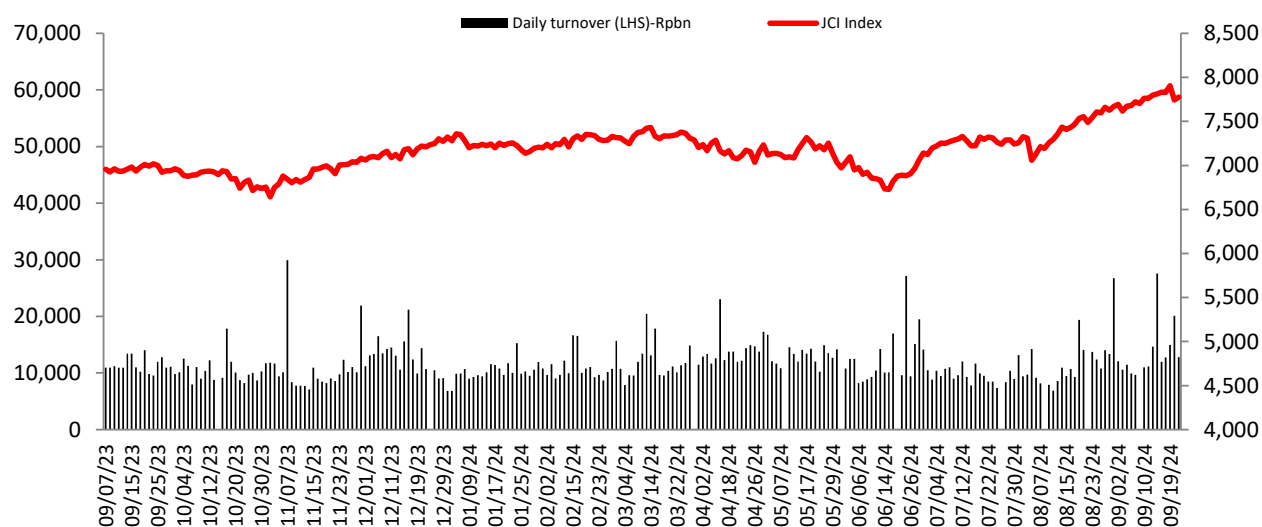
BOND MARKET

MIXED TRADING

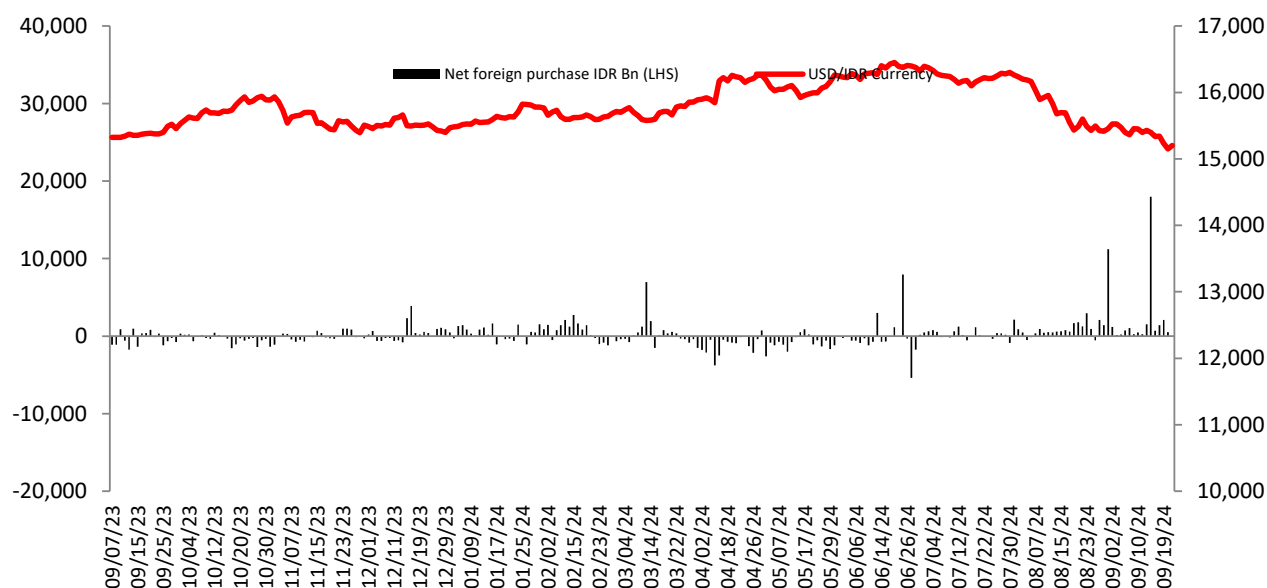
Indonesia bond market start the week with wide spread. In the morning session, we heard several players came to market to unload and take profit on middle tenors. Profit taker was seen from the interbank. While on the afternoon session as we witnessed local names showed their buying interest particularly after London opened although trading volume remained thin. The benchmark series of 5, 10, 15 and 20Y closed at mid-yield of 6.15%, 6.43%, 6.57% and 6.68% respectively. Spot opened at 15,148 and close 15,206.

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	0.0	1.1	5Y
FR91	FR0091 Govt	99.7	(0.1)	0.6	10Y
FR93	FR0093 Govt	98.5	0.0	0.2	15Y
FR92	FR0092 Govt	104.2	0.4	0.4	20Y
PBS036	INDOIS 5 ½ 08/15/25	99.2	0.0	1.1	15-8-2025
PBS003	INDOIS 6 01/15/27	99.1	0.0	1.1	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.0	0.0	0.6	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.8	0.0	1.0	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,775.7	0.4	6.9	
Thailand	SET Index	1,448.9	(0.2)	2.3	
Korean Stock Exch.	KOSPI Index	2,602.0	0.3	(2.0)	
Straight Times	FSSTI Index	3,638.5	0.4	12.3	
Kuala Lumpur	KLCI Index	1,665.3	(0.2)	14.5	
Philippines	PCOMP Index	7,417.3	2.3	15.0	
Nikkei	NKY Index	37,723.9	1.5	12.7	
Hang Seng	HSI Index	18,247.1	(0.1)	7.0	
MSCI-Asia pacific	MXAP Index	186.5	0.6	10.1	
<u>Global Indices</u>					
Dow Jones	INDU Index	42,063.4	0.1	11.6	
S&P 500	SPX Index	5,702.6	(0.2)	19.6	
Nasdaq	CCMP Index	17,948.3	(0.4)	19.6	
FTSE 100	UKX Index	8,228.8	(0.0)	6.4	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,200.0	(0.3)	1.3
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,090.0	(1.2)	(2.1)
3 month	IDSWT3M Index	15,273.3	(0.5)	1.1
6 month	IDSWT6M Index	15,102.7	(1.1)	2.1
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,124.3	(1.0)	2.1
6 month	IDFWT6M Index	15,222.5	(0.9)	1.9

*price as of 9/21/2024



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