

FOR PROFESSIONAL INVESTORS - 06/07/2024

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Volatile

JCI slightly strengthened and closed at 6,975 (+27 points or +0.39%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net outflow of IDR 592Bn today and rupiah slightly strengthened to IDR 16,260/USD.

Banking stocks were positive as BMRI (+2.92%), BBRI (+2.27%), BBNI (+3.47%), BBKA (+0.26%), and BBTN (+1.57%) all up. Consumer names were positive as KLBF (+1.61%), ICBP (+1.44%), INDF (+1.22%), MYOR (+3.95%), and SIDO (+1.38%) all closed higher. Material stocks were positive as TPIA (+0.58%) and BRPT (+2.09%) all up. Telco names were negative as EXCL (-2.6%), FREN (-8.82%), and TLKM (-0.33%) all retreated. Other movers were INTP (+6.18%), INKP (+3.05%), BHIT (-8.82%), and CLEO (-8.21%).

Ministry of Transport is proposing an additional Rp15.8tn for the indicative budget for next year. Previously, the indicative budget set for next year is higher at Rp38.6tn compared to Rp24.7tn this year.

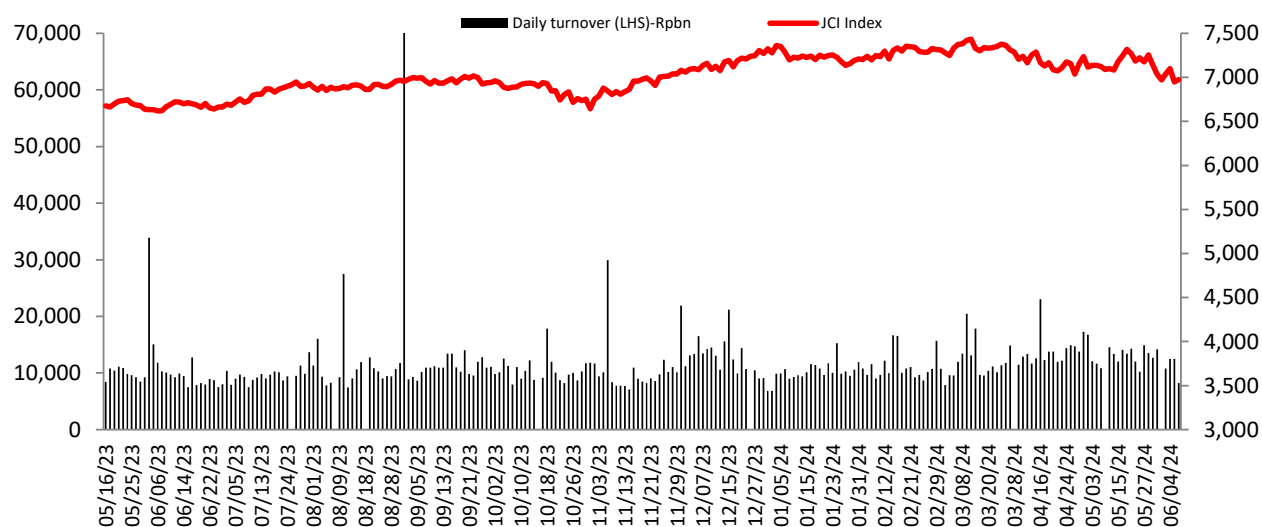
BOND MARKET

Unchanged Sentiment

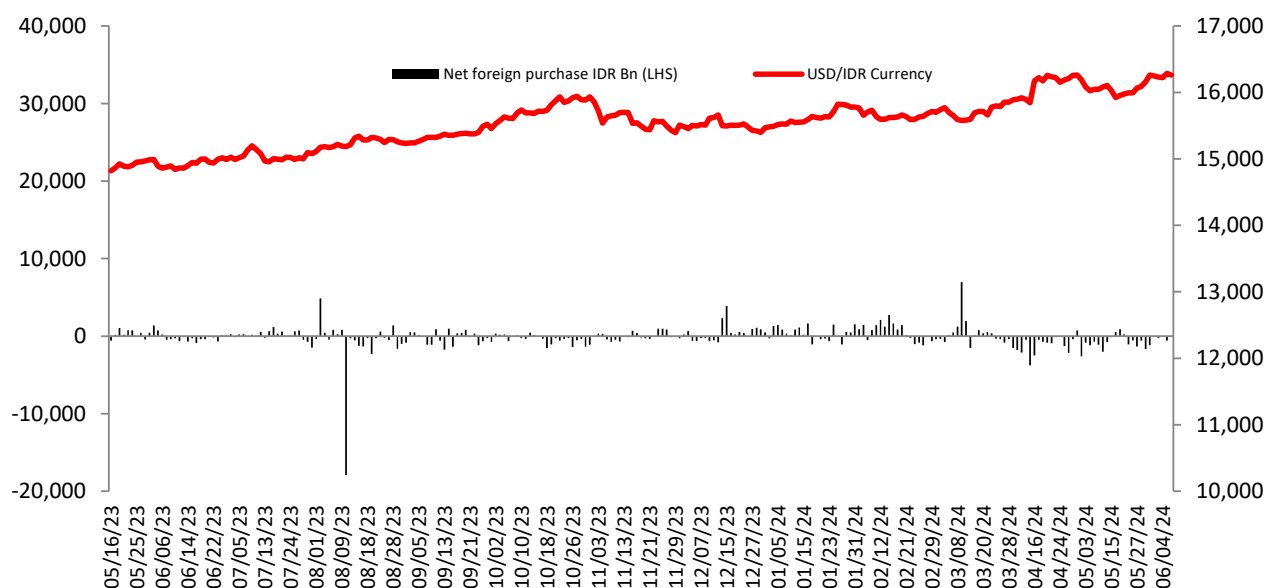
Indonesia bond market closed the week with unchanged sentiment ahead of the highly anticipated ECB rates decision tonight. Market is still moving two ways in the morning session, although in the second session bond market was pretty quiet. Trading concentrated on front to middle maturities while the other part of the yield curve was quoted within range throughout the day. IDR bond the prices ended the day unchanged from yesterday level. The 5Y/10Y/15Y/20Y benchmark closed the week at mid yield of 6.85%/6.9%/6.93%/6.99%.

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	96.1	0.0	(0.2)	5Y
FR91	FR0091 Govt	97.1	0.1	(2.0)	10Y
FR93	FR0093 Govt	96.1	(0.0)	(2.3)	15Y
FR92	FR0092 Govt	101.7	0.0	(2.1)	20Y
PBS036	INDOIS 5 ½ 08/15/25	98.5	0.0	0.4	15-8-2025
PBS003	INDOIS 6 01/15/27	98.2	(0.0)	(0.0)	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.8	(0.0)	0.4	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.9	(0.0)	0.1	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,974.9	0.4	(4.1)	
Thailand	SET Index	1,328.4	(0.7)	(6.2)	
Korean Stock Exch.	KOSPI Index	2,689.5	1.0	1.3	
Straight Times	FSSTI Index	3,330.8	0.0	2.8	
Kuala Lumpur	KLCI Index	1,614.7	0.4	11.0	
Philippines	PCOMP Index	6,509.9	1.1	0.9	
Nikkei	NKY Index	38,703.5	0.6	15.7	
Hang Seng	HSI Index	18,476.8	0.3	8.4	
MSCI-Asia pacific	MXAP Index	178.5	(0.1)	5.4	
<u>Global Indices</u>					
Dow Jones	INDU Index	38,807.3	0.2	3.0	
S&P 500	SPX Index	5,354.0	1.2	12.2	
Nasdaq	CCMP Index	17,187.9	2.0	14.5	
FTSE 100	UKX Index	8,271.0	0.3	7.0	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,260.0	0.2	(5.3)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,271.0	0.4	5.6
3 month	IDSWT3M Index	16,285.4	0.4	(5.4)
6 month	IDSWT6M Index	16,280.2	0.4	(5.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,294.7	0.4	(5.5)
6 month	IDFWT6M Index	16,312.3	0.2	(5.1)

*price as of 6/6/2024



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