

FOR PROFESSIONAL INVESTORS - 01/20/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

EXTENDED BUYING

JCI slightly strengthened and closed at 7,171 (+16 points or +0.22%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net outflow of IDR 276Bn today and rupiah was stabilized at IDR 16,360/USD.

Banking stocks were mostly positive as BBRI (+3.18%), BMRI (+2.13%), BBNI (+3.36%), and PNB (+4.56%) all advanced, except BBKA (-2.78%). Consumer names were negative as KLBF (-0.41%), MYOR (-1.6%), UNVR (-2.23%), ICBP (-2.77%), and INDF (-2.96%) all declined. Telco stocks were mixed as FREN (+4.35%) rose, while ISAT (-1.32%) and TLKM (-1.88%) down. Cement names were positive as SMGR (+3.16%), INTP (+0.41%), SMBR (+1.03%), and SMCB (+0.67%) all in green. Other movers were PYFA (+34.48%), CMNP (+22.22%), HEAL (-4.08%), and AMRT (-2.11%).

Ministry of Energy and Mineral Resources (ESDM) set Domestic Market Obligation target in 2025 at 239.7mn ton 2024 DMO target and realization at 191.3mn ton and 209.9mn ton respectively).

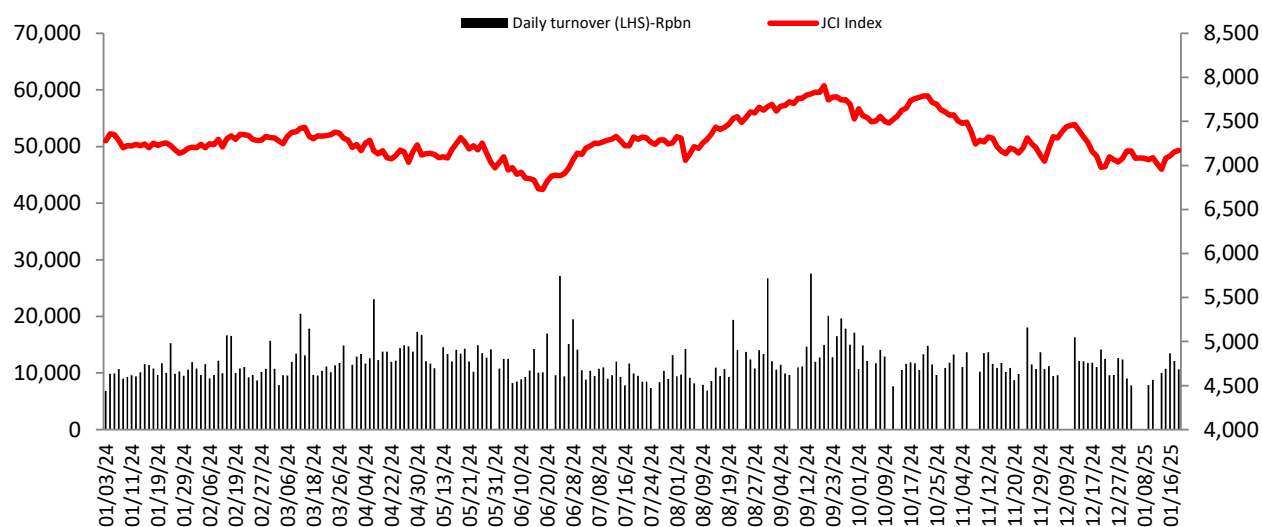
BOND MARKET

Within Range

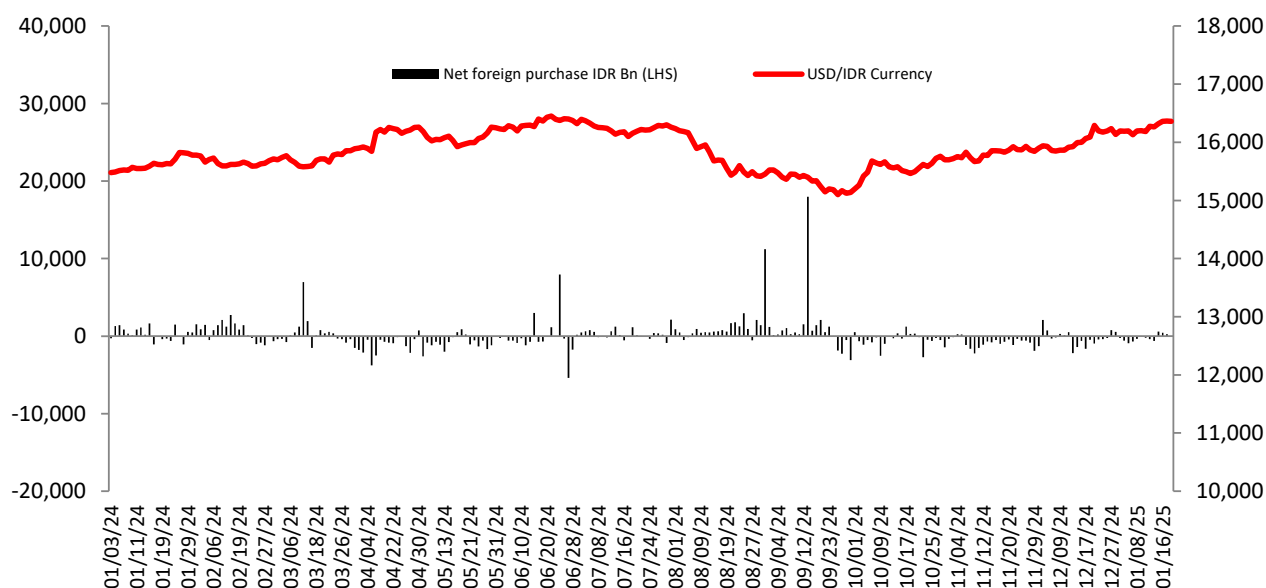
It was dull trading day for bond market with hardly any trade heard done at least from our end. Investors shied away ahead of auction tomorrow and Trump's inauguration tonight. There will be fresh supply tomorrow after BI surprise cut last week. Indonesia Debt Management Office ("DMO") will hold conventional bond auction with IDR 26Tn issuance target. The series that will be issued are 3M SPN, 12M SPN, 5Y FR104, 10Y FR103, 15Y FR106, 20Y FR107, 30Y FR102 and 40Y FR105. In the previous conventional auction, incoming bids reached IDR 31.65Tn and DMO issued IDR 26.2Tn

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	(0.0)	0.3	5Y
FR91	FR0091 Govt	96.0	(0.0)	(0.4)	10Y
FR93	FR0093 Govt	94.2	0.1	(0.7)	15Y
FR92	FR0092 Govt	98.6	(0.2)	(1.6)	20Y
PBS036	INDOIS 5 ¼ 08/15/25	99.4	0.0	0.3	15-8-2025
PBS003	INDOIS 6 01/15/27	98.3	0.2	0.3	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	99.6	(0.0)	0.0	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	94.9	(0.0)	(2.1)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,170.7	0.2	1.3	
Thailand	SET Index	1,341.2	0.0	(4.2)	
Korean Stock Exch.	KOSPI Index	2,520.1	(0.1)	5.0	
Straight Times	FSSTI Index	3,811.9	0.0	0.6	
Kuala Lumpur	KLCI Index	1,572.3	0.4	(4.3)	
Philippines	PCOMP Index	6,349.9	(0.0)	(2.7)	
Nikkei	NKY Index	38,902.5	1.2	(2.5)	
Hang Seng	HSI Index	19,925.8	1.7	(0.7)	
MSCI-Asia pacific	MXAP Index	178.8	(0.1)	(1.5)	
<u>Global Indices</u>					
Dow Jones	INDU Index	43,487.8	0.8	2.2	
S&P 500	SPX Index	5,996.7	1.0	2.0	
Nasdaq	CCMP Index	19,630.2	1.5	1.7	
FTSE 100	UKX Index	8,528.9	0.3	4.4	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,360.0	0.0	(1.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,365.0	(0.1)	0.7
3 month	IDSWT3M Index	16,369.6	(0.1)	(1.3)
6 month	IDSWT6M Index	16,368.3	(0.0)	(1.4)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,400.1	(0.1)	(1.4)
6 month	IDFWT6M Index	16,462.5	0.1	(1.5)

*price as of 1/18/2025



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