

FOR PROFESSIONAL INVESTORS - 01/10/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Slightly higher

JCI slightly strengthened and closed at 7,089 (+24 points or +0.34%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net outflow of IDR 201Bn today and rupiah was stabilized at IDR 16,185/USD.

Banking stocks were mostly negative as BBNI (-0.68%), BBRI (-0.5%), BBCA (-1.27%), and BMRI (-2.61%) all corrected, except BNLN (+4.9%). Consumer names were mixed as INDF (+3%), ICBP (+0.45%), and UNVR (+0.89%) advanced, while MYOR (-0.73%) and KLBF (-0.79%) down. Mining stocks were mostly positive as ANTM (+3.17%), PTBA (+2.67%), INDY (+8.41%), and TINS (+3.52%) all in green, except ADRO (-0.85%). Telco names were mixed as TLKM (+2.29%) up, ISAT (-0.42%) closed lower, and EXCL unchanged. Other movers were JSPT (+19.69%), BUMI (+12.96%), STTP (-2.36%), and CTRA (-2.06%).

Bank Indonesia (BI) survey Consumer Confidence Index (CCI) in Dec2024 at 127.7 (up 1.8 ppt from Nov2024)

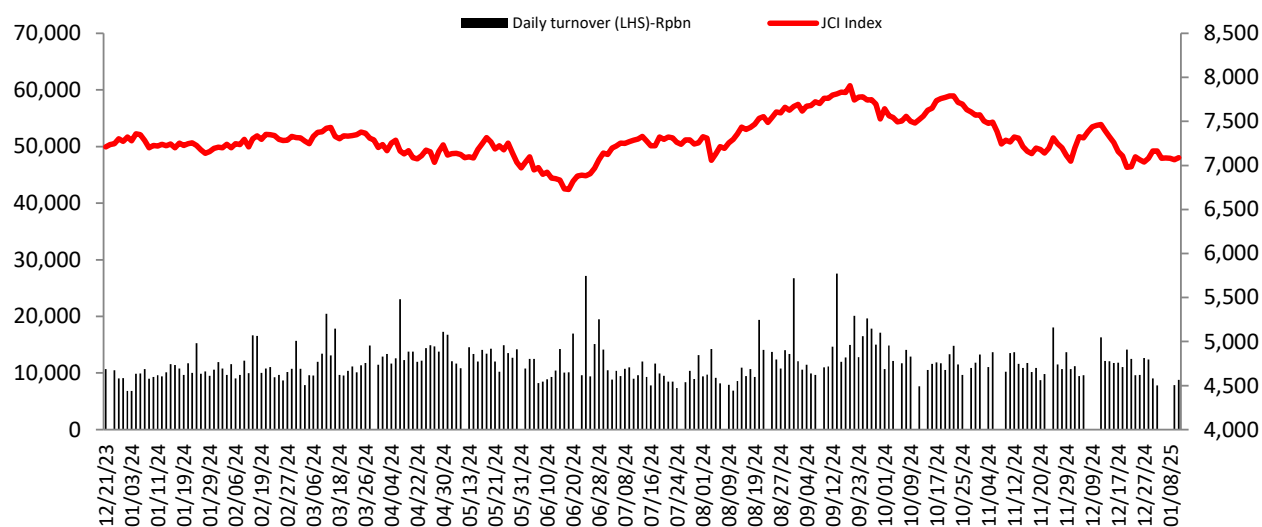
BOND MARKET

Better Demand

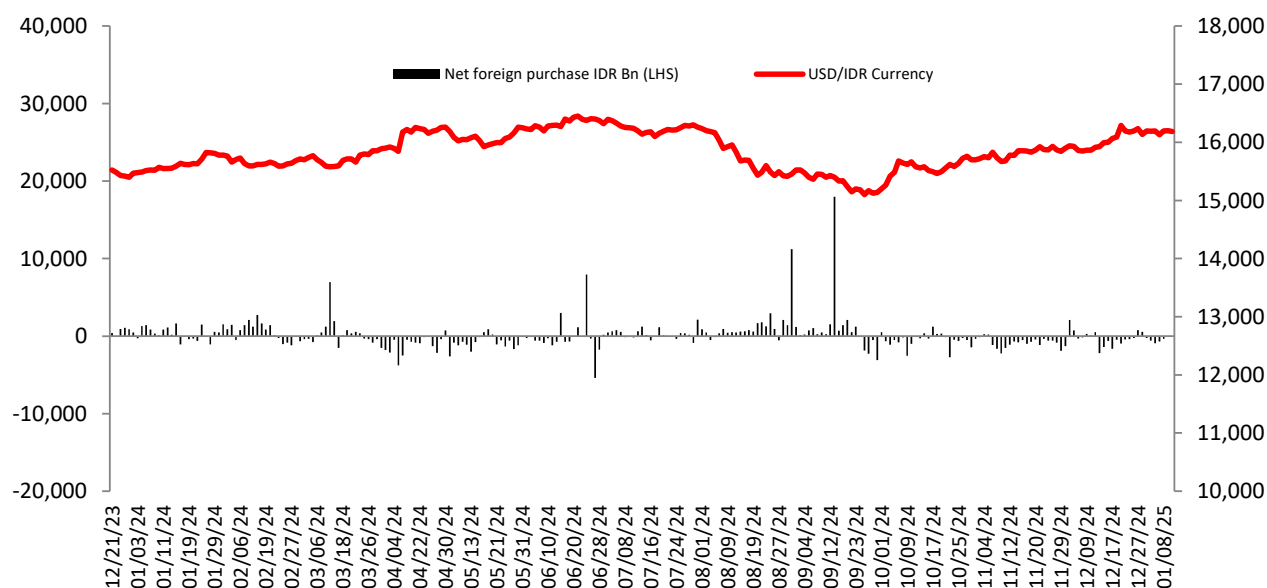
Indonesia bond market closed the week with better sentiment. Rupiah strengthened to 16,180/90 and highest incoming bids on SRBI auction, triggered bullish tone in bond market. Market trading was particularly active on short-end areas which remained as the most actively traded bonds for the day. The interest were came from local players and offshore real money names. Bond market in the end closed with the short-end curve down by 3 – 7 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	96.2	(0.0)	(0.0)	5Y
FR91	FR0091 Govt	95.8	0.2	(0.6)	10Y
FR93	FR0093 Govt	94.3	0.0	(0.5)	15Y
FR92	FR0092 Govt	99.4	0.0	(0.8)	20Y
PBS036	INDOIS 5 ½ 08/15/25	99.4	(0.0)	0.3	15-8-2025
PBS003	INDOIS 6 01/15/27	98.1	(0.0)	0.2	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.0	0.6	0.4	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	96.8	(0.1)	(0.2)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,088.9	0.3	0.1	
Thailand	SET Index	1,368.0	0.4	(2.3)	
Korean Stock Exch.	KOSPI Index	2,515.8	(0.2)	4.8	
Straight Times	FSSTI Index	3,801.6	(1.6)	0.4	
Kuala Lumpur	KLCI Index	1,602.4	0.1	(2.4)	
Philippines	PCOMP Index	6,496.3	(0.2)	(0.5)	
Nikkei	NKY Index	39,190.4	(1.0)	(1.8)	
Hang Seng	HSI Index	19,064.3	(0.9)	(5.0)	
MSCI-Asia pacific	MXAP Index	179.4	(0.7)	(1.2)	
<u>Global Indices</u>					
Dow Jones	INDU Index	42,635.2	0.3	0.2	
S&P 500	SPX Index	5,918.3	0.2	0.6	
Nasdaq	CCMP Index	19,478.9	(0.1)	0.9	
FTSE 100	UKX Index	8,299.6	(0.2)	1.5	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,185.0	0.1	(0.5)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,231.1	0.1	(0.1)
3 month	IDSWT3M Index	16,232.8	0.2	(0.5)
6 month	IDSWT6M Index	16,232.6	0.2	(0.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,263.1	0.2	(0.6)
6 month	IDFWT6M Index	16,383.6	0.3	(1.0)

*price as of 1/10/2025

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