FOR PROFESSIONAL INVESTORS - 10/11/2024

DAILY REPORT
INDONESIA MARKET WRAP

EQUITY MARKET

Slightly Higher

JCI advanced and closed at 7,521 (+41 points or +0.54%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net outflow of IDR 89Bn today and rupiah advanced to IDR 15,580/USD.

Banking stocks were mostly positive as BBRI (+0.82%), BBNI (+0.94%), BBTN (+4.32%), and BNLI (+0.96%) all up, except BBCA (-1.19%). Consumer names were mixed as KLBF (+4.24%), ICBP (+1.66%), and MYOR (+0.76%) inched higher, while UNVR (-0.44%) and INDF (-0.36%) retreated. Properties stocks were positive as CTRA (+5.64%), BSDE (+7.59%), PWON (+4.34%), and SMRA (+5.11%) all up. Cement names were positive as SMGR (+6.42%), INTP (+4.71%), SMBR (+3.36%), and SMCB (+6.2%) all up. Other movers were PANI (+6.43%), BRMS (+4.58%), MSIN (-2.33%), and ACES (-1.66%).

President-elect Prabowo’s government is opening opportunities for businesses to participate in supporting the 3mn housing project and develop housing in villages and large investors to develop housing in cities. So far, there is reportedly an investor from China that is interested to participate in this housing program.

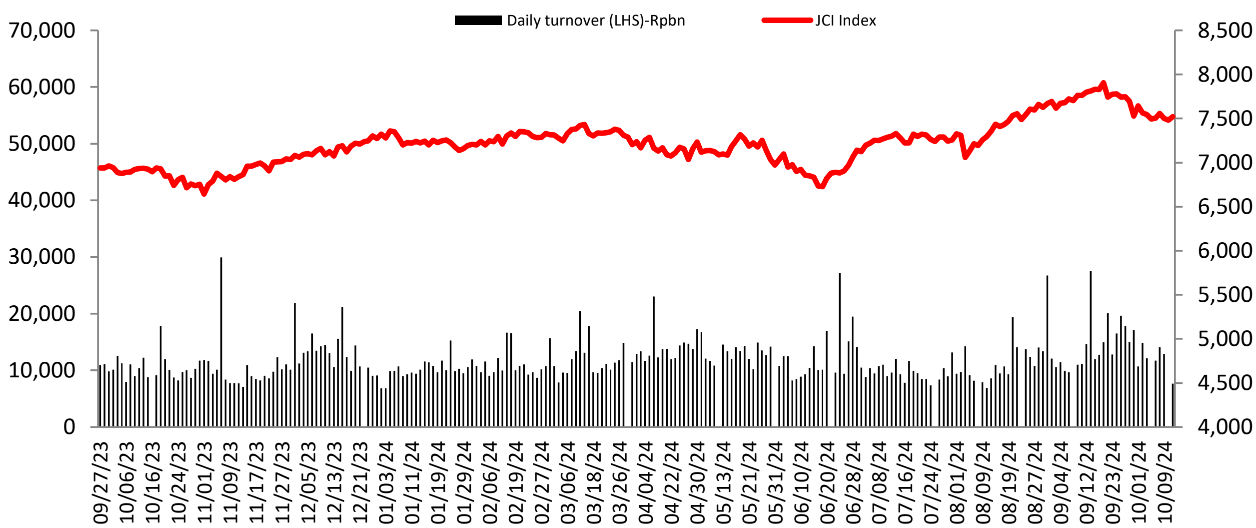
BOND MARKET

NOTHING CHANGE

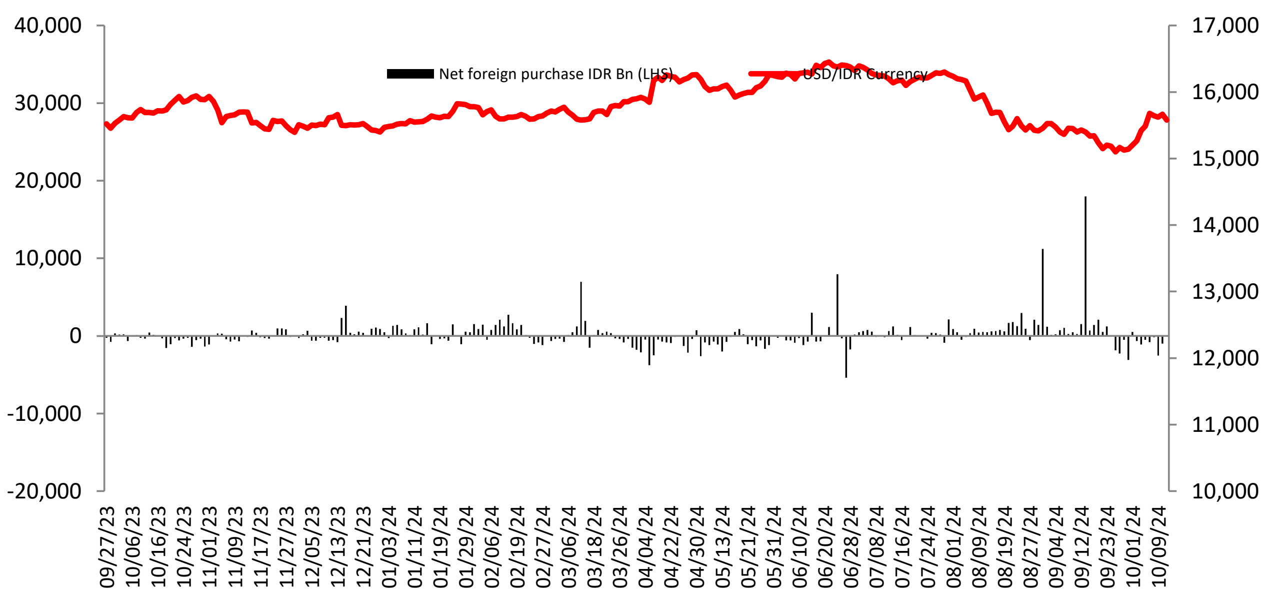
The bond market closed the day unchanged. IDR bond prices moved range bound throughout the day after US mixed data last night. U.S. consumer inflation. Trading concentrated on front to mid maturities while the other part of the yield curve was quoted within range. Market players put on defensive stance ahead of next week regular bond auction. The benchmark series 5Y/10Y/15Y/20Y closed the week at mid-yield of 6.4%/6.67%/6.77%/6.84% respectively. Rupiah closed at 15,578.

GRAPHS & TABLES

JCI & DAILY TURNOVER



IDR & NET FOREIGN PURCHASES



EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
Bonds					
FR90	FR0090 Govt	97.4	(0.1)	1.2	5Y
FR91	FR0091 Govt	98.8	0.1	(0.2)	10Y
FR93	FR0093 Govt	96.8	(0.0)	(1.3)	15Y
FR92	FR0092 Govt	102.2	0.1	(1.6)	20Y
PBS036	INDOIS 5 ⅜ 08/15/25	99.4	0.0	1.3	15-8-2025
PBS003	INDOIS 6 01/15/27	99.2	(0.0)	1.3	15-01-2027
PBS037	INDOIS 6 ⅞ 03/15/36	100.9	(0.0)	0.6	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.0	(0.0)	0.2	15-06-2047
Asia Pacific					
Jakarta Composite	JCI Index	7,520.6	0.5	3.4	
Thailand	SET Index	1,472.9	0.3	4.0	
Korean Stock Exch.	KOSPI Index	2,596.9	(0.1)	(2.2)	
Straight Times	FSSTI Index	3,573.8	(0.3)	10.3	
Kuala Lumpur	KLCI Index	1,633.6	(0.5)	12.3	
Philipines	PCOMP Index	7,310.3	(1.4)	13.3	
Nikkei	NKY Index	39,605.8	0.6	18.4	
Hang Seng	HSI Index	21,252.0	3.0	24.7	
MSCI-Asia pacific	MXAP Index	192.5	0.7	13.7	
Global Indices					
Dow Jones	INDU Index	42,454.1	(0.1)	12.6	
S&P 500	SPX Index	5,780.1	(0.2)	21.2	
Nasdaq	CCMP Index	18,282.1	(0.1)	21.8	
FTSE 100	UKX Index	8,225.1	(0.2)	6.4	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,580.0	0.5	(1.2)
Swap-IDR				
1 month	IDSWT1M Index	15,636.5	0.2	1.4
3 month	IDSWT3M Index	15,665.1	0.4	(1.4)
6 month	IDSWT6M Index	15,656.7	0.4	(1.5)
Forward-IDR				
3 month	IDFWT3M Index	15,687.4	0.3	(1.6)
6 month	IDFWT6M Index	15,707.0	0.2	(1.2)

*price as of 10/11/2024

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