

FOR PROFESSIONAL INVESTORS - 01/10/2024

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Slight Rebound

JCI slightly strengthened and closed at 7,227 (+27 points or +0.38%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net inflow of IDR 86Bn today and rupiah slightly weakened to IDR 15,570/USD.

Banking stocks were mixed as BMRI (+0.78%), MEGA (+0.96%), and PNB (+1.33%) in green, while BBNI (-0.88%) and BBCA (-0.78%) declined. Consumer names were mixed as ICBP (+2.95%) and GGRM (+1.1%) inched higher, while INDF (-0.39%), UNVR (-0.58%), and KLBF (-0.63%) retreated. Telco stocks were positive as TLKM (+1.01%), FREN (+6%), and ISAT (+2.43%) all in green. Hospital names were positive as MIKA (+4.17%), HEAL (+2.46%), and SILO (+1.44%) all inched higher. Other movers were MAPA (+6.82%), APIC (+6.74%), TPIA (-5.21%), and TOWR (-2.55%).

Indonesia Dec retail sales estimates rises 4.8% MoM.

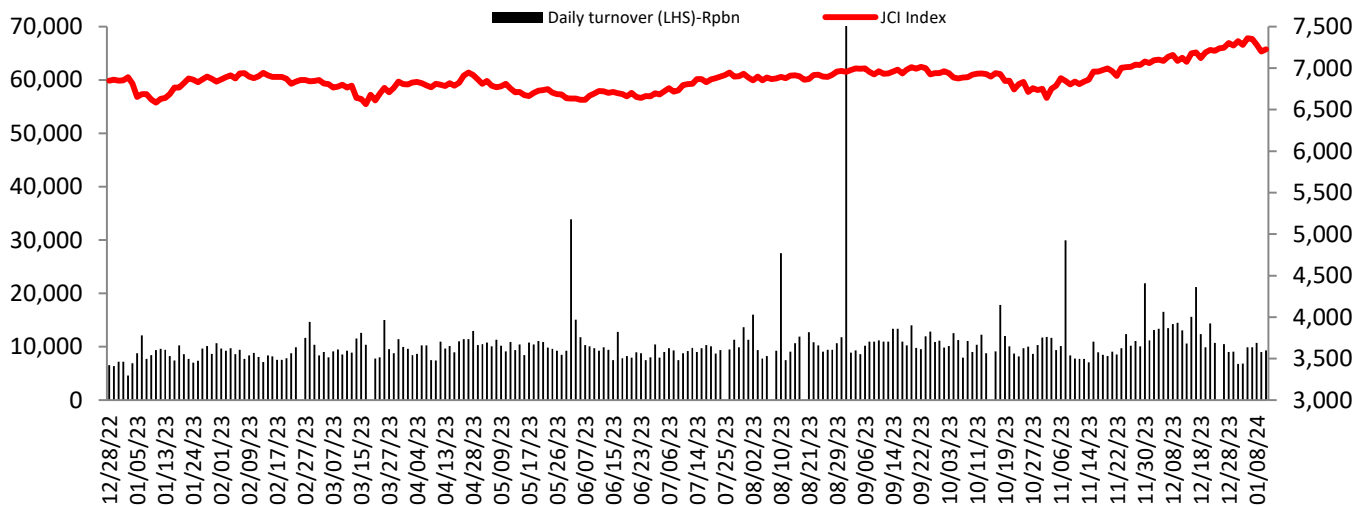
BOND MARKET

Nothing Change

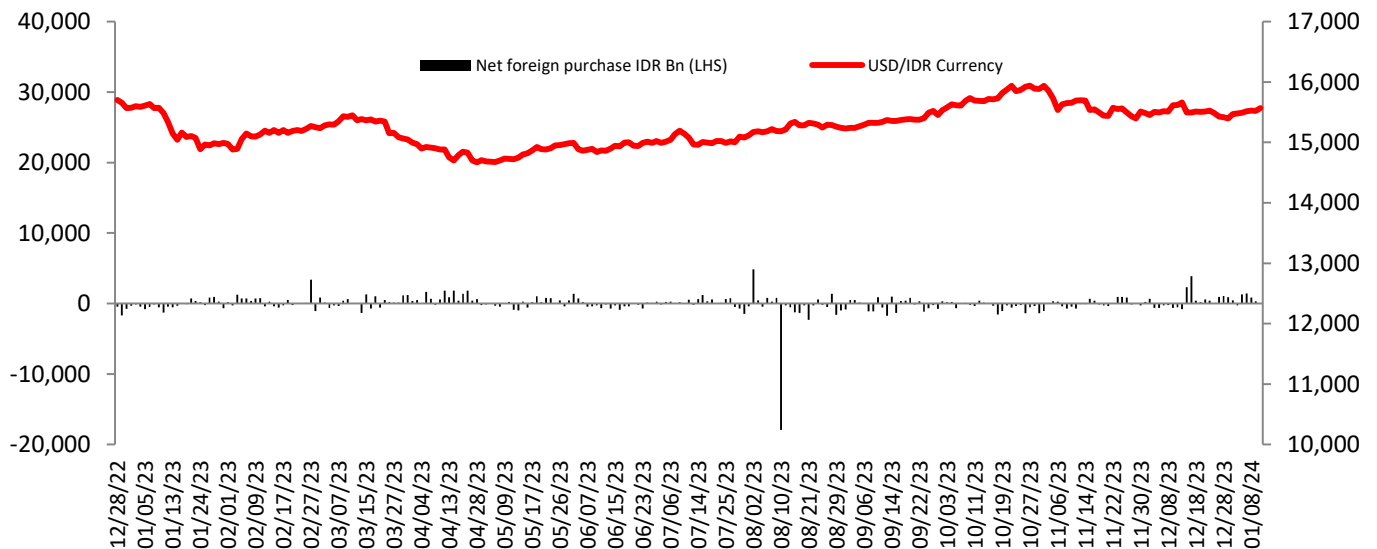
The bond market opened the day unchanged. IDR bond prices moved range bound throughout the day despite Rupiah traded a tad higher. Trading concentrated on mid to long maturities while the other part of the yield curve was quoted within range. Ahead of US inflation data on Thursday, market players put on defensive stance. The benchmark series remain as market's favorite. The benchmark series 5Y/10Y/15Y/20Y closed at mid-yield of 6.6%/6.7%/6.8%/6.9% respectively.

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	96.3	(0.1)	(0.0)	5Y
FR91	FR0091 Govt	98.2	0.0	(0.9)	10Y
FR93	FR0093 Govt	97.9	0.0	(0.5)	15Y
FR92	FR0092 Govt	102.8	0.0	(1.0)	20Y
PBS036	INDOIS 5 ¾ 08/15/25	98.3	0.1	0.2	15-8-2025
PBS003	INDOIS 6 01/15/27	98.3	0.0	0.4	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.8	(0.1)	0.5	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.3	0.2	(0.5)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,227.3	0.4	(0.6)	
Thailand	SET Index	1,413.5	(0.1)	(0.2)	
Korean Stock Exch.	KOSPI Index	2,542.0	(0.8)	(4.3)	
Straight Times	FSSTI Index	3,180.0	(0.6)	(1.9)	
Kuala Lumpur	KLCI Index	1,486.9	(0.8)	2.2	
Philippines	PCOMP Index	6,546.1	(1.1)	1.5	
Nikkei	NKY Index	34,441.7	2.0	2.9	
Hang Seng	HSI Index	16,097.3	(0.6)	(5.6)	
MSCI-Asia pacific	MXAP Index	165.3	0.1	(2.4)	
<u>Global Indices</u>					
Dow Jones	INDU Index	37,525.2	(0.4)	(0.4)	
S&P 500	SPX Index	4,756.5	(0.1)	(0.3)	
Nasdaq	CCMP Index	14,857.7	0.1	(1.0)	
FTSE 100	UKX Index	7,666.1	(0.2)	(0.9)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,570.0	(0.3)	(1.1)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,505.0	(0.1)	0.6
3 month	IDSWT3M Index	15,521.3	(0.0)	(0.5)
6 month	IDSWT6M Index	15,515.4	(0.1)	(0.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,527.7	0.0	(0.5)
6 month	IDFWT6M Index	15,557.0	0.1	(0.3)

*price as of 1/10/2024

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