

FOR PROFESSIONAL INVESTORS - 10/18/2024

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Uptrend

JCI slightly strengthened and closed at 7,760 (+25 points or +0.32%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 287Bn today and rupiah slightly strengthened to IDR 15,465/USD.

Banking stocks were mixed as BBNI (+2.73%), BBKA (+0.23%), and PNB (+8.4%) closed higher, while BBRI (-0.2%) and BMRI (-0.69%) down. Consumer names were mostly positive as INDF (+3.48%), ICBP (+2.4%), KLBF (+1.48%), and MYOR (+0.75%) all closed higher, except UNVR (-1.69%). Telco stocks were positive as TLKM (+1.97%), ISAT (+1.66%), and FREN (+3.7%) all rose. Hospital names were negative as SILO (-1.92%), HEAL (-4.52%), and MIKA (-5.5%) all declined. Other movers were MLPL (+34.43%), MLPT (+19.83%), BUMI (-4.79%), and ADRO (-3.08%).

Bank Indonesia (BI) reported an expansion in the manufacturing industry in 3Q24, according to its latest PMI report. BI PMI stood at 51.54 in 3Q24, softening from 51.97 in 2Q24, with respondents expecting further deceleration in expansion in 4Q24.

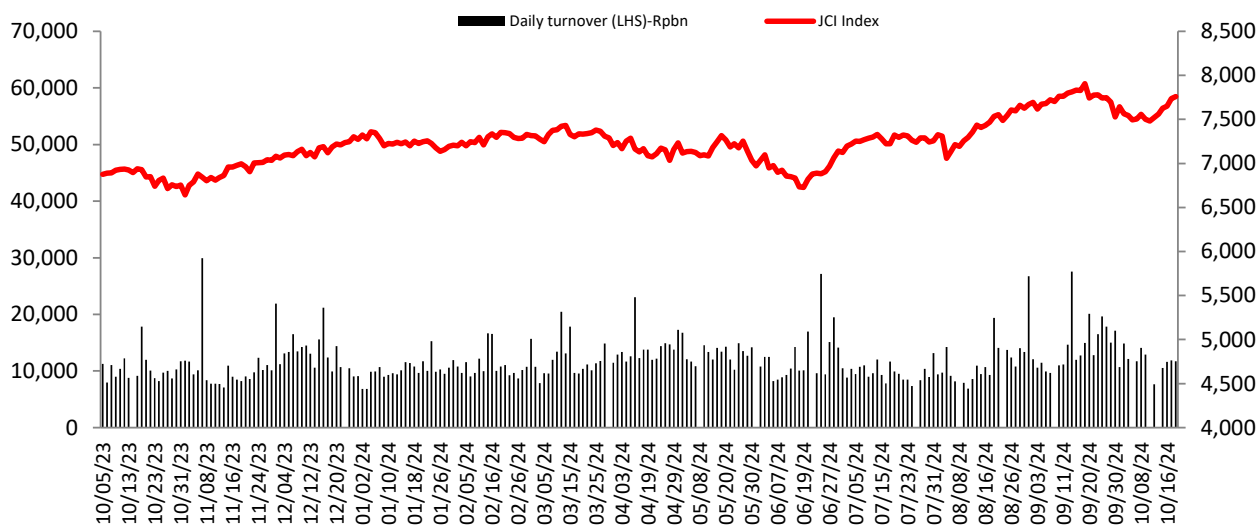
### BOND MARKET

#### Nothing Change

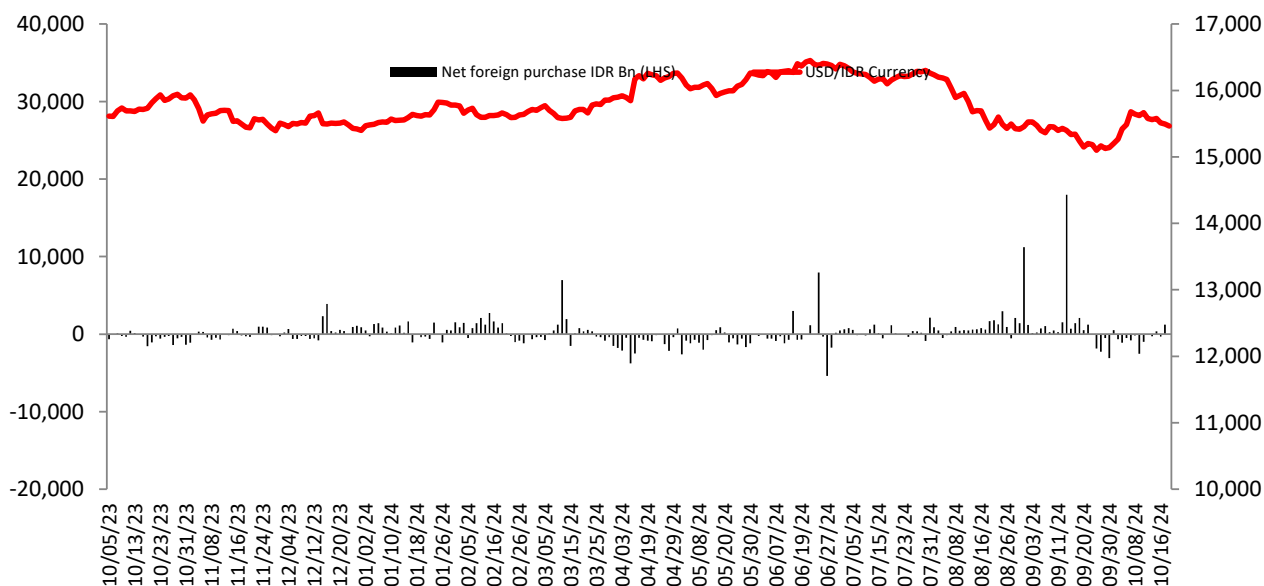
Indonesia bond market closed the week relatively flat despite higher UST rates overnight after higher US retail sales data. The bond market saw no improvement in risk sentiment today although we witnessed two ways trading in the market. While we still witnessed mixed names showed their selling interest particularly after London opened although trading volume remained thin. Thin trading volume during the day pushed bidders to be more defensive. Yields were higher by around 2 – 3 bps across the curve.

## 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	97.3	0.0	1.1	5Y
FR91	FR0091 Govt	99.3	0.1	0.3	10Y
FR93	FR0093 Govt	97.4	0.0	(0.8)	15Y
FR92	FR0092 Govt	102.3	(0.0)	(1.5)	20Y
PBS036	INDOIS 5 ¾ 08/15/25	99.4	0.0	1.4	15-8-2025
PBS003	INDOIS 6 01/15/27	99.2	(0.1)	1.3	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.9	0.0	0.5	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.0	0.0	0.2	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,760.1	0.3	6.7	
Thailand	SET Index	1,492.5	(0.2)	5.4	
Korean Stock Exch.	KOSPI Index	2,593.8	(0.6)	(2.3)	
Straight Times	FSSTI Index	3,640.2	0.4	12.3	
Kuala Lumpur	KLCI Index	1,646.0	0.3	13.2	
Philippines	PCOMP Index	7,415.7	0.2	15.0	
Nikkei	NKY Index	38,981.8	0.2	16.5	
Hang Seng	HSI Index	20,804.1	3.6	22.0	
MSCI-Asia pacific	MXAP Index	189.1	(0.4)	11.7	
<u>Global Indices</u>					
Dow Jones	INDU Index	43,239.1	0.4	14.7	
S&P 500	SPX Index	5,841.5	(0.0)	22.5	
Nasdaq	CCMP Index	18,373.6	0.0	22.4	
FTSE 100	UKX Index	8,372.4	(0.2)	8.3	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,465.0	0.2	(0.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,541.0	(0.2)	0.8
3 month	IDSWT3M Index	15,518.6	(0.1)	(0.4)
6 month	IDSWT6M Index	15,522.6	(0.1)	(0.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,532.4	(0.2)	(0.6)
6 month	IDFWT6M Index	15,554.6	(0.6)	(0.3)

\*price as of 10/18/2024



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