

FOR PROFESSIONAL INVESTORS - 01/09/2025

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Slightly Lower

JCI slightly weakened and closed at 7,065 (-16 points or -0.22%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net inflow of IDR 39Bn today and rupiah was stabilized at IDR 16,200/USD.

Banking stocks were mixed as BBKA (+1.81%), BNLI (+5.15%), and BBNI (+0.23%) rose, while MEGA (-0.5%) and BBRI (-1.23%) weakened. Consumer names were mixed as INDF (+0.33%) and SIDO (+2.52%) closed higher, while KLBF (-0.39%), ICBP (-0.68%), and UNVR (-2.03%) down. Cement stocks were negative as SMCB (-1.33%), SMBR (-0.99%), INTP (-1.92%), and SMGR (-2.62%) all declined. Material names were mixed as TPIA (+3%) up, while BRPT unchanged. Other movers were BBHI (+13.04%), BOGA (+7.27%), INPC (-9.09%), and RAJA (-7.06%).

Bank Indonesia reported that Indo forex reserve rose +3.7% MoM (US\$5.5bn) to US\$155.7bn in Dec24. This amount is equivalent to financing 6.7 months of imports or 6.5 months of imports and servicing the gov't's external debt.

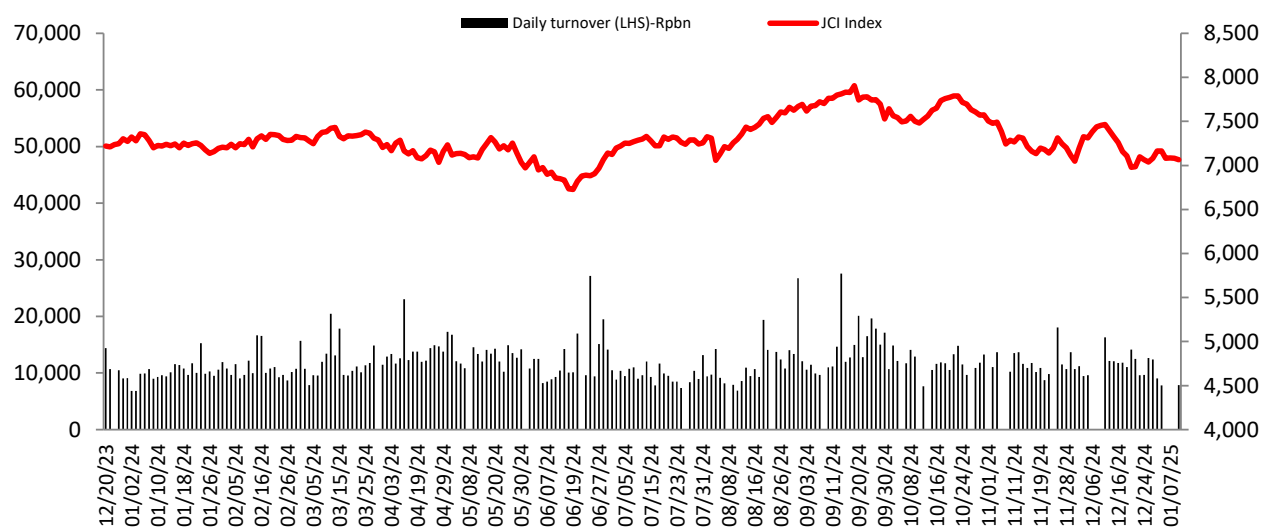
### BOND MARKET

#### THIN SUPPORT

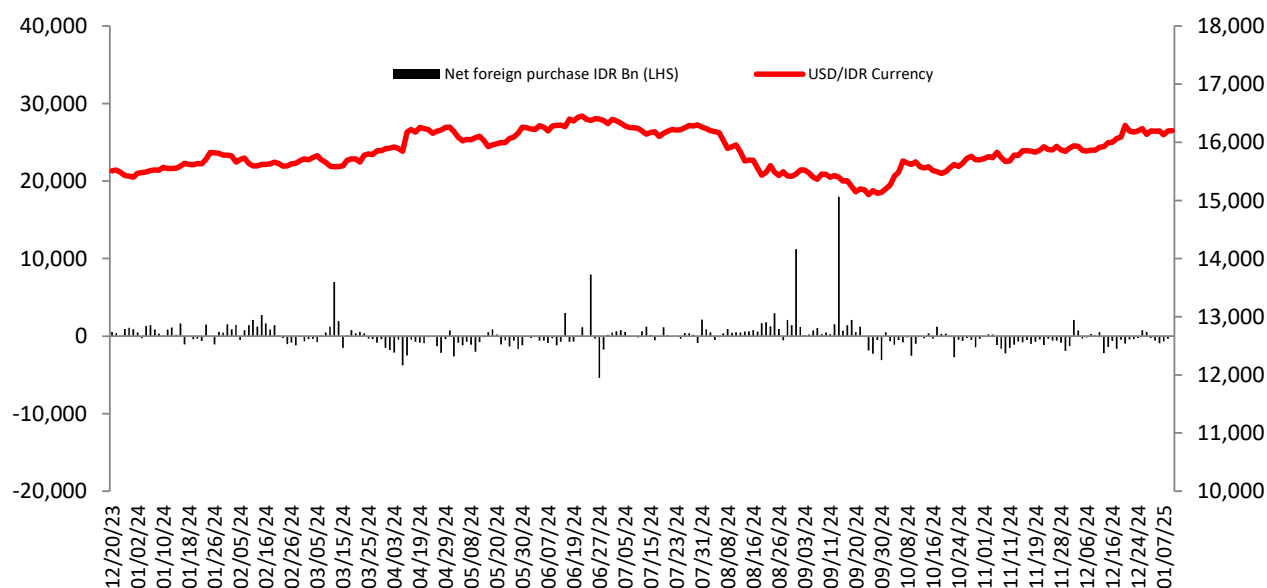
Indonesia bond market start the day with biddish tone. Buying interest remained thick which were centered around 10Y area. Support came from local and offshore real money names. However, we saw several foreign players unloading their inventory in short and long end. The mixed interest still continued until market closed. All in all, the yield curve closed 1-2 bps higher than yesterday level. The 5Y/10Y/15Y/20Y benchmark closed the week at mid yield of 7.09%/7.18%/7.22%/7.23%

## 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	(0.1)	0.0	5Y
FR91	FR0091 Govt	95.6	(0.3)	(0.8)	10Y
FR93	FR0093 Govt	94.3	(0.3)	(0.6)	15Y
FR92	FR0092 Govt	99.3	(0.1)	(0.8)	20Y
PBS036	INDOIS 5 ¾ 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	99.4	(0.6)	(0.2)	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	7,064.6	(0.2)	(0.2)	
Thailand	SET Index	1,363.0	(1.8)	(2.7)	
Korean Stock Exch.	KOSPI Index	2,521.9	0.0	5.1	
Straight Times	FSSTI Index	3,862.6	(0.6)	2.0	
Kuala Lumpur	KLCI Index	1,600.8	(0.9)	(2.5)	
Philippines	PCOMP Index	6,511.6	0.2	(0.3)	
Nikkei	NKY Index	39,605.1	(0.9)	(0.7)	
Hang Seng	HSI Index	19,240.9	(0.2)	(4.1)	
MSCI-Asia pacific	MXAP Index	180.7	(0.7)	(0.5)	
<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	8,293.4	0.5	1.5	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,200.0	(0.0)	(0.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,201.7	(0.1)	(0.3)
3 month	IDSWT3M Index	16,146.2	(0.3)	0.1
6 month	IDSWT6M Index	16,184.7	(0.0)	(0.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,191.4	(0.1)	(0.1)
6 month	IDFWT6M Index	16,254.2	(0.3)	(0.2)

\*price as of 1/9/2025



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