



FOR PROFESSIONAL INVESTORS - 10/13/2023

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Slide lower

"JCI slightly weakened and closed at 6,927 (-8 points or -0.12%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net inflow of IDR 150Bn today and rupiah was stabilized at IDR 15,683/USD.

Banking stocks were mixed as BBKA (+0.28%) and PNBK (+2.47%) rose, while MEGA (-0.96%), BBRI (-0.47%), and BBNI (-2.82%) closed lower. Consumer names were mixed as KLBK (+0.57%) and UNVR (+0.55%) inched higher, while MYOR (-0.77%), INDF (-0.37%), and ICBP (-0.91%) closed lower. Properties stocks were negative as PWON (-1.4%), SMRA (-3.31%), CTRA (-2.36%), and BSDE (-3.21%) all down. Pulp & paper names were negative as TKIM (-3.04%) and INKP (-1.86%) all closed lower. Other movers were TCPI (+5.09%), STTP (+4.2%), ARTO (-8.47%), and EMTK (-4.65%).

The government has added to the list of goods that will be subject to import duties as regulated in Minister of Finance Regulation (PMK) No. 96/2023. Previously there were four categories of goods including bags, books, textiles and footwear. There are currently four additional categories including cosmetics, bicycles, watches, and steel.

BOND MARKET

Slightly higher

Indonesia bond market start the day with positive sentiment after US CPI slightly higher than expected. As soon as market opened, market players was seen bullish tone. Flow was mainly heard from onshore names collecting non benchmark and benchmark series throughout the day, while mixed names seen on both sides. Market closed with yields lower by 5 – 8 bps compared to yesterday closing level.

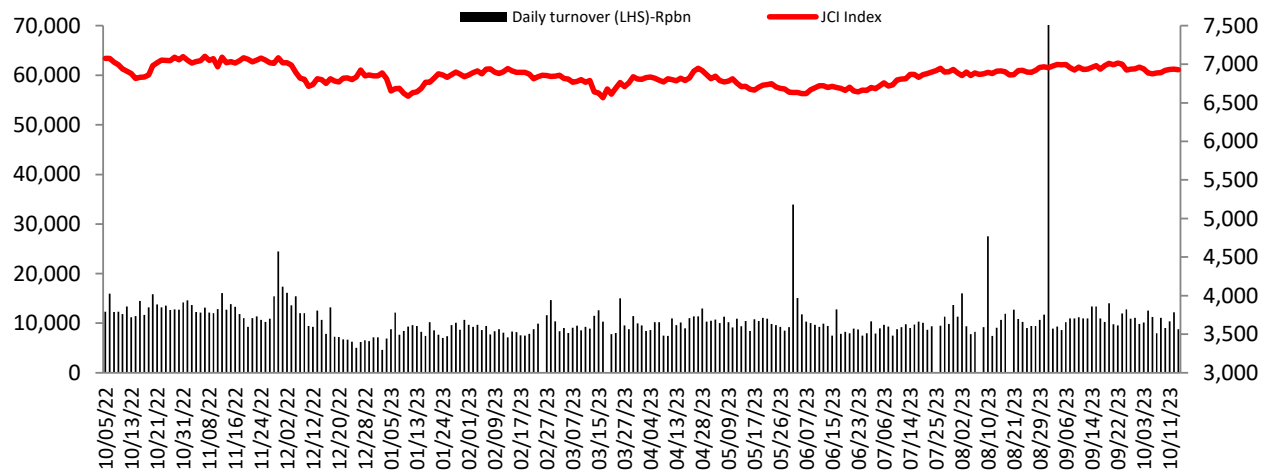


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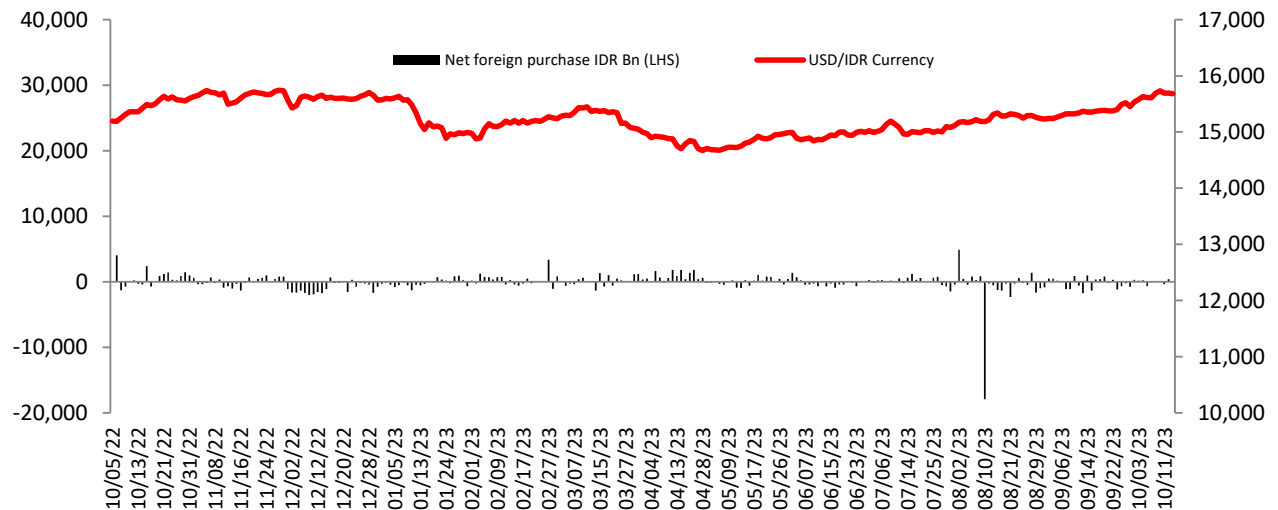
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GRAPHS & TABLES

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	95.6	0.0	(0.6)	5Y
FR91	FR0091 Govt	97.2	0.3	0.9	10Y
FR93	FR0093 Govt	95.3	(0.0)	(1.7)	15Y
FR92	FR0092 Govt	99.5	#VALUE!	(0.8)	20Y
PBS036	INDOIS 5 ¾ 08/15/25	98.3	(0.0)	0.7	15-8-2025
PBS003	INDOIS 6 01/15/27	99.3	(0.0)	1.1	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.6	(0.0)		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.6	0.0	5.1	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,926.8	(0.1)	1.1	
Thailand	SET Index	1,450.8	(0.4)	(13.1)	
Korean Stock Exch.	KOSPI Index	2,456.2	(1.0)	9.8	
Straight Times	FSSTI Index	3,185.8	(1.0)	(2.0)	
Kuala Lumpur	KLCI Index	1,444.1	0.0	(3.4)	
Philippines	PCOMP Index	6,266.3	0.1	(4.6)	
Nikkei	NKY Index	32,316.0	(0.5)	23.8	
Hang Seng	HSI Index	17,813.5	(2.3)	(9.9)	
MSCI-Asia pacific	MXAP Index	159.2	0.8	2.2	
<u>Global Indices</u>					
Dow Jones	INDU Index	33,631.1	(0.5)	1.5	
S&P 500	SPX Index	4,349.6	(0.6)	13.3	
Nasdaq	CCMP Index	13,574.2	(0.6)	29.7	
FTSE 100	UKX Index	7,613.8	(0.4)	2.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,683.0	0.0	(0.7)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,700.0	(0.0)	(0.1)
3 month	IDSWT3M Index	15,701.0	(0.0)	(0.8)
6 month	IDSWT6M Index	15,700.1	0.0	(0.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,706.8	(0.1)	(0.9)
6 month	IDFWT6M Index	15,727.8	0.7	(0.5)

*price as of 10/12/2023


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