



FOR PROFESSIONAL INVESTORS - 01/15/2024

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Slide down

JCI slightly weakened and closed at 7,224 (-17 points or -0.24%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 185Bn today and rupiah was stabilized at IDR 15,555/USD.

Banking stocks were mixed as BBCA (+0.26%) and BBNI (+0.45%) advanced, while MEGA (-0.48%), BBRI (-0.43%), and BMRI (-1.14%) declined. Consumer names were mixed as INDF (+1.18%), HMSP (+1.7%), and MYOR (+1.24%) inched higher, while ICBP (-0.45%) and UNVR (-1.15%) closed lower. Material stocks were negative as BRPT (-4.69%) and TPIA (-9.27%) all closed lower. Hospital names were mixed as SILO (+3.21%) in green, while MIKA (-1.5%) and HEAL (-3.05%) corrected. Other movers were DSSA (+9.15%), MAPI (+4.67%), CASA (-7.95%), and SMSM (-4.46%).

Based on data from the Association of Indonesian Automotive Industries (Gaikindo), wholesale sales (factory to dealer) of national cars were corrected 4% year on year (YoY) to 1,005,802 units during January-December 2023. Three times the same, retail sales (dealer to consumer) national cars also fell 1.5% YoY to 998,059 units

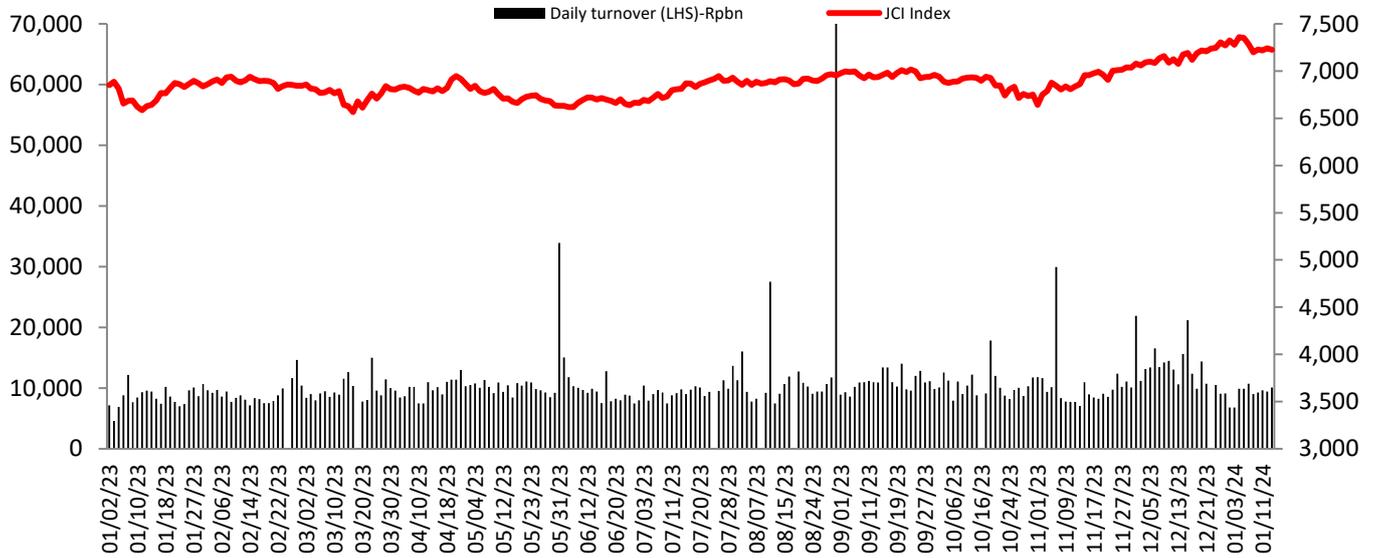
### BOND MARKET

#### Flat Trading Day

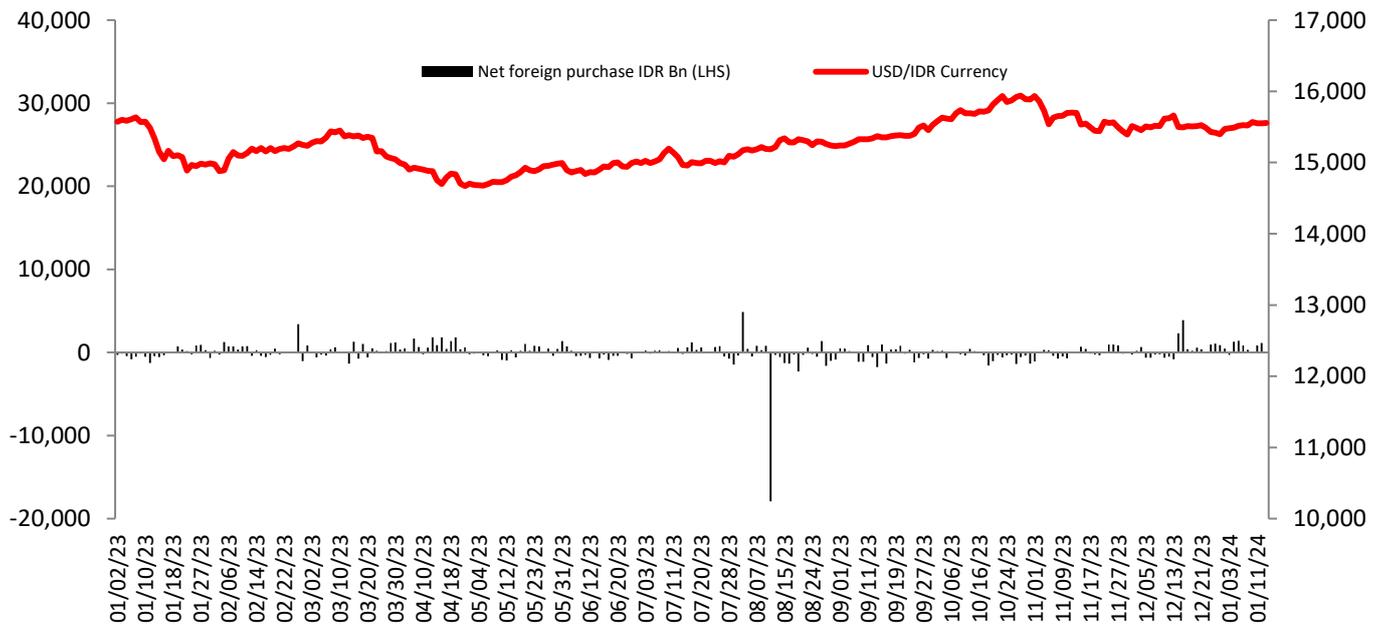
It was slow day for the bond market with no supportive catalyst was seen. No significant trading was heard in the market at least from our end. Market players were defensive and stay sidelined throughout the day. Price movement was relatively within range as US on holiday. Tomorrow, Indonesia Debt Management Office (“DMO”) will hold its regular bond auction with target of IDR 24Tn (IDR 1Tn lower than previous auction target). The series that will be issued are 3M SPN, 12M SPN, 5Y FR101, 10Y FR100, 15Y FR98, 20Y FR97 and 30Y FR102. In the previous conventional auction, incoming bids reached IDR 28.303Tn and DMO issued IDR 12Tn.

# 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	96.5	0.0	0.3	5Y
FR91	FR0091 Govt	98.4	0.0	(0.6)	10Y
FR93	FR0093 Govt	98.1	0.1	(0.3)	15Y
FR92	FR0092 Govt	102.6	(0.1)	(1.2)	20Y
PBS036	INDOIS 5 ¾ 08/15/25	98.2	#VALUE!	0.1	15-8-2025
PBS003	INDOIS 6 01/15/27	98.4	(0.1)	0.2	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.1	0.0	0.7	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	7,224.0	(0.2)	(0.7)	
Thailand	SET Index	1,406.2	(0.5)	(0.7)	
Korean Stock Exch.	KOSPI Index	2,526.0	0.0	(4.9)	
Straight Times	FSSTI Index	3,196.7	0.2	(1.3)	
Kuala Lumpur	KLCI Index	1,501.1	0.9	3.2	
Philippines	PCOMP Index	6,680.5	0.6	3.6	
Nikkei	NKY Index	35,901.8	0.9	7.3	
Hang Seng	HSI Index	16,216.3	(0.2)	(4.9)	
MSCI-Asia pacific	MXAP Index	167.5	0.6	(1.1)	
<u>Global Indices</u>					
Dow Jones	INDU Index	37,593.0	(0.3)	(0.3)	
S&P 500	SPX Index	4,783.8	0.1	0.3	
Nasdaq	CCMP Index	14,972.8	0.0	(0.3)	
FTSE 100	UKX Index	7,606.0	(0.2)	(1.6)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,555.0	(0.0)	(1.0)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,550.0	(0.1)	0.9
3 month	IDSWT3M Index	15,558.3	0.0	(0.7)
6 month	IDSWT6M Index	15,558.4	(0.0)	(0.9)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,565.7	0.0	(0.8)
6 month	IDFWT6M Index	15,575.0	0.1	(0.4)

\*price as of 1/13/2024

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