

FOR PROFESSIONAL INVESTORS - 06/06/2024

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Sold Off

JCI weakened and closed at 6,948 (-152 points or -2.14%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 598Bn today and rupiah slightly weakened to IDR 16,285/USD.

Banking stocks were mostly negative as MEGA (-0.95%), BBNI (-0.65%), BBRI (-1.12%), and BMRI (-2.44%) all closed lower, except BBCA (+1.07%). Material names were negative as BRPT (-8.61%) and TPIA (-9.9%) all retreated. Consumer stocks were mixed as ICBP (+1.21%), KLBF (+0.65%), and INDF (+0.41%) up, while HMSP (-1.35%) and UNVR (-1.92%) declined. Mining names were negative as PTBA (-1.56%), ITMG (-2.17%), INCO (-5.54%), ADRO (-1.71%), and ANTM (-6.94%) all declined. Other movers were SMMA (+4.23%), MAPI (+3.45%), ESSA (-10.63%), and MDKA (-8.68%).

President Jokowi mentioned an investor from United Arab Emirates (UAE) and the owner of Emaar Properties is going to invest in the Nusantara capital city (IKN) development. The signing of the investment plan is going to take place in July 2024.

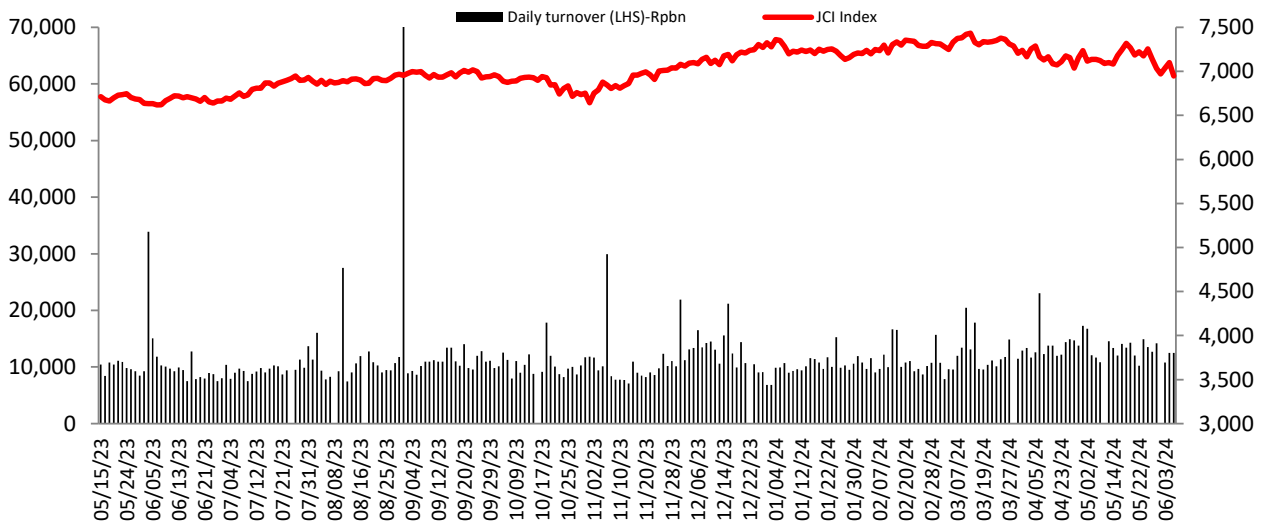
### BOND MARKET

#### WEAKENED

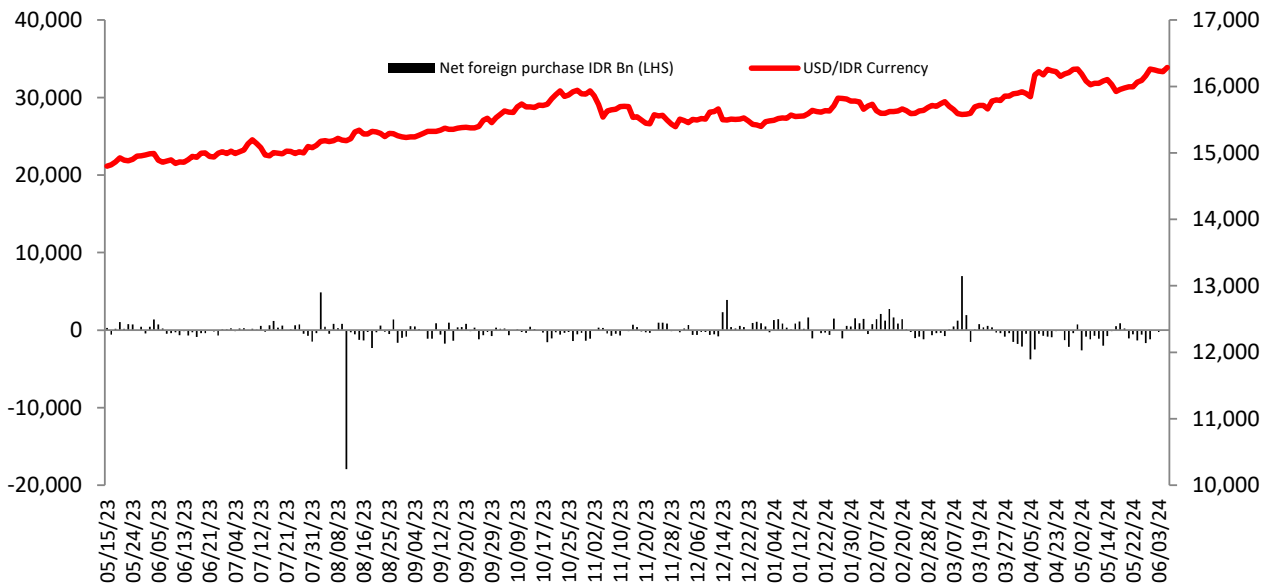
Bond market opened wider as price quotation continued its downward movement from yesterday despite US Jobs data last night. Selling activity mainly done by foreign names on benchmark and non-benchmark series. Post lunch, we have seen few investors had taken the opportunity to collecting at the bottom. Support was seen from the local names. However this support failed to lift the prices. Yield curve closed higher around 4 – 5 bps. In today SRBI auction, incoming bids were 60.6T IDR. BI sold 23T IDR on SRBI.

## 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	96.1	0.0	(0.2)	5Y
FR91	FR0091 Govt	97.0	(0.4)	(2.1)	10Y
FR93	FR0093 Govt	96.2	0.0	(2.2)	15Y
FR92	FR0092 Govt	101.7	(0.1)	(2.1)	20Y
PBS036	INDOIS 5 ½ 08/15/25	98.5	0.0	0.4	15-8-2025
PBS003	INDOIS 6 01/15/27	98.2	(0.0)	(0.0)	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.8	(0.0)	0.5	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.9	0.0	0.1	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,947.7	(2.1)	(4.5)	
Thailand	SET Index	1,338.3	0.1	(5.5)	
Korean Stock Exch.	KOSPI Index	2,689.5	1.0	1.3	
Straight Times	FSSTI Index	3,330.0	(0.3)	2.8	
Kuala Lumpur	KLCI Index	1,608.5	(0.4)	10.6	
Philippines	PCOMP Index	6,441.3	0.9	(0.1)	
Nikkei	NKY Index	38,490.2	(0.9)	15.0	
Hang Seng	HSI Index	18,425.0	(0.1)	8.1	
MSCI-Asia pacific	MXAP Index	178.8	(0.8)	5.5	
<u>Global Indices</u>					
Dow Jones	INDU Index	38,711.3	0.4	2.7	
S&P 500	SPX Index	5,291.3	0.2	10.9	
Nasdaq	CCMP Index	16,857.1	0.2	12.3	
FTSE 100	UKX Index	8,245.4	0.2	6.6	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,285.0	(0.4)	(5.5)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,211.1	(0.1)	5.2
3 month	IDSWT3M Index	16,215.9	(0.0)	(5.0)
6 month	IDSWT6M Index	16,222.0	0.0	(5.2)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,237.7	0.1	(5.1)
6 month	IDFWT6M Index	16,275.4	(0.0)	(4.9)

\*price as of 6/5/2024



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