



FOR PROFESSIONAL INVESTORS - 10/15/2024

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Pushing Higher

JCI advanced and closed at 7,627 (+67 points or +0.89%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 340Bn today and rupiah slightly weakened to IDR 15,580/USD.

Banking stocks were mostly positive as BMRI (+1.81%), BBCA (+1.19%), BBNI (+1.38%), and BBRI (+0.41%) all closed higher, except MEGA (-0.4%). Consumer names were positive as KLBK (+2.04%), INDF (+2.13%), ICBP (+1.82%), UNVR (+1.29%), and MYOR (+1.13%) all up. Material stocks were positive as TPIA (+1.74%) and BRPT (+0.99%) all in green. Hospital names were positive as MIKA (+1.61%), SILO (+3.08%), and HEAL (+0.64%) all rose. Other movers were BRMS (+5.11%), MAPI (+4.65%), AKRA (-4.89%), and FREN (-3.57%).

President-elect Prabowo Subianto is reportedly going to establish at least 45 ministries. Several ministries will be split, resulting in the Ministry of Forestry, Ministry of Environment, Ministry of Law, Ministry of Human Rights, Ministry of Public Housing, and Ministry of Public Works.

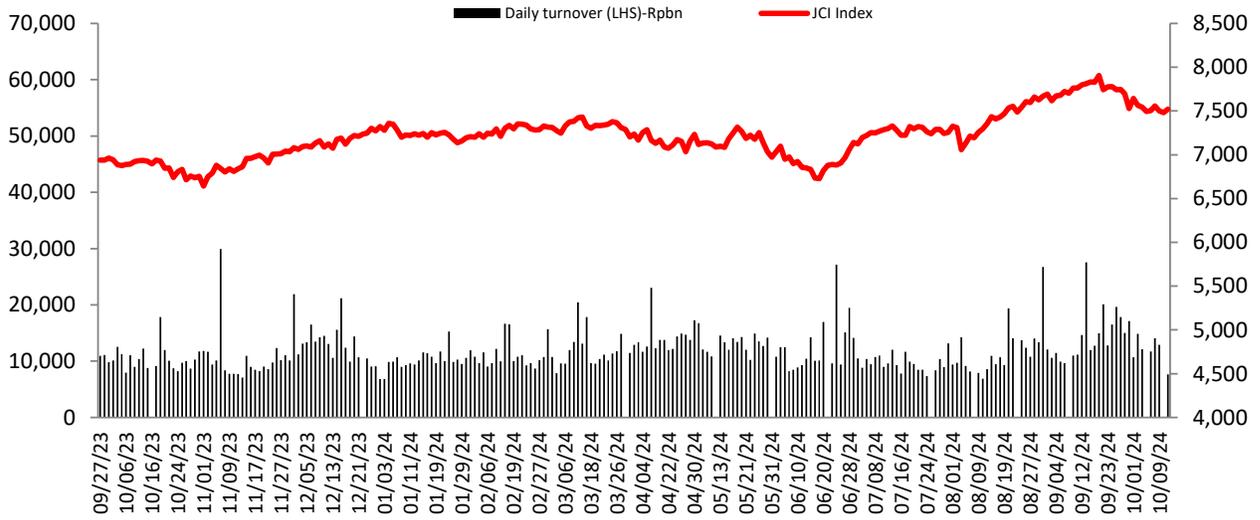
BOND MARKET

Auction Day

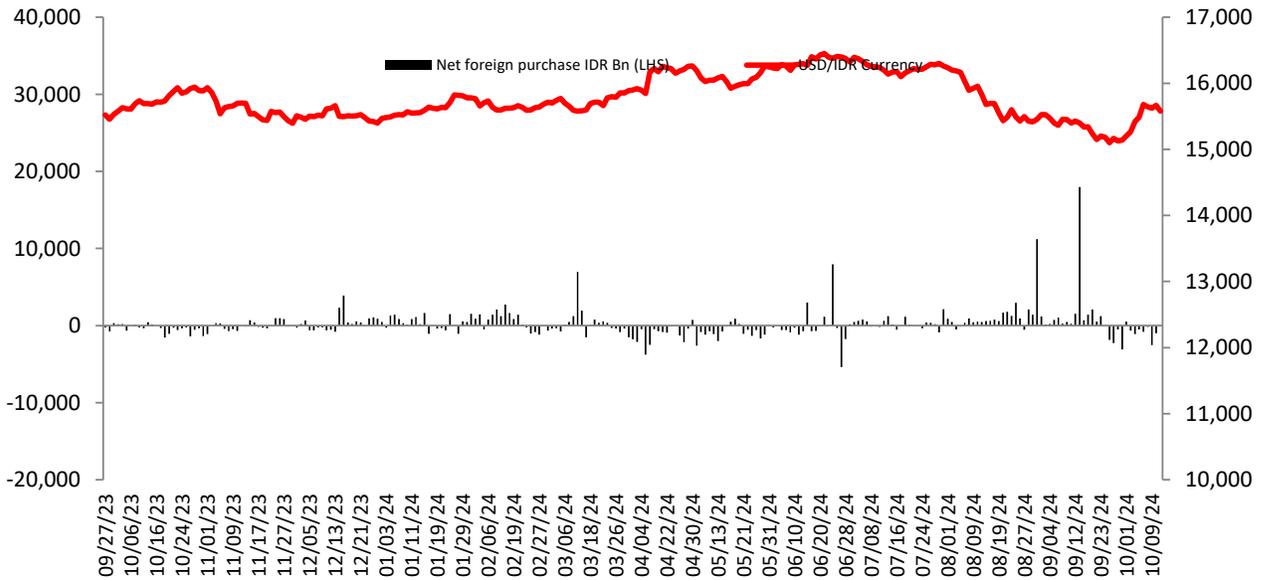
Indonesia bond market opened with wide spread as players turned defensive and stood sideline. Ahead of government bonds auction, we only seen several traded in the market. Yield managed to close the day higher around 1 to 2 bps compare to yesterday closing level. In today auction, MoF managed to upsize the issuance to IDR 25Tn (initial target: IDR 22Tn). The series absorbed (against incoming bids) on the auction were IDR 2Tn (IDR 5.018Tn) 12mo SPN, IDR 7.35Tn (IDR 12.084Tn) 6Y FR104, IDR 11.2Tn (IDR 15.212Tn) 11Y FR103, IDR 2.1Tn (IDR 3.419Tn) 15Y FR98, IDR 0.8Tn (IDR 2.831Tn) 20Y FR97 and IDR 1.55Tn (IDR 3.597Tn) 30Y FR102 at weighted average yields of 6.1%, 6.42%, 6.71%, 6.81%, 6.88%, and 6.94% respectively. No winner on 3mo SPN.

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	98.9	(0.0)	(0.1)	10Y
FR93	FR0093 Govt	97.3	0.0	(0.9)	15Y
FR92	FR0092 Govt	102.3	0.0	(1.5)	20Y
PBS036	INDOIS 5 ¼ 08/15/25	99.4	#VALUE!	1.4	15-8-2025
PBS003	INDOIS 6 01/15/27	99.2	(0.0)	1.2	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.9	0.0	0.6	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	7,627.0	0.9	4.9	
Thailand	SET Index	1,465.0	(0.3)	3.5	
Korean Stock Exch.	KOSPI Index	2,633.5	0.4	(0.8)	
Straight Times	FSSTI Index	3,595.5	(0.0)	11.0	
Kuala Lumpur	KLCI Index	1,642.0	0.3	12.9	
Philippines	PCOMP Index	7,456.3	1.8	15.6	
Nikkei	NKY Index	39,910.6	0.8	19.3	
Hang Seng	HSI Index	20,318.8	(3.7)	19.2	
MSCI-Asia pacific	MXAP Index	192.3	(0.1)	13.5	
<u>Global Indices</u>					
Dow Jones	INDU Index	43,065.2	0.5	14.3	
S&P 500	SPX Index	5,859.9	0.8	22.9	
Nasdaq	CCMP Index	18,502.7	0.9	23.3	
FTSE 100	UKX Index	8,263.2	(0.4)	6.9	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,580.0	(0.1)	(1.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,636.5	0.2	1.4
3 month	IDSWT3M Index	15,569.9	(0.2)	(0.8)
6 month	IDSWT6M Index	15,602.0	(0.4)	(1.2)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,604.7	(0.1)	(1.0)
6 month	IDFWT6M Index	15,652.6	0.1	(0.9)

*price as of 10/15/2024

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