

FOR PROFESSIONAL INVESTORS - 08/09/2024

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Trending upward

JCI advanced and closed at 7,257 (+62 points or +0.86%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 451Bn today and rupiah slightly weakened to IDR 15,925/USD.

Banking stocks were mostly positive as BMRI (+0.74%), BBNI (+1.99%), BBRI (+0.21%), and PNB (+0.86%) all rose, except BBCA (-0.73%). Consumer names were positive as ICBP (+2.05%), INDF (+0.8%), KLBF (+0.6%), SDO (+1.43%), and HMSP (+0.78%) all in green. Material stocks were positive as TPIA (+1.45%) and BRPT (+0.97%) all inched higher. Poultry names were negative as MAIN (-9.66%), JPFA (-3.63%), and CPIN (-1.43%) all corrected. Other movers were BIPI (+12.9%), BHIT (+9.52%), MMLP (-4.12%), and MAPA (-1.81%).

Government extended safeguard duties imposed to import products like carpet, fabrics, and textiles covering for 3 years. This is done to protect and increase the competitiveness of local textile based product. The extension of duties is under PMK No 48 2024 and PMK No 40 2024

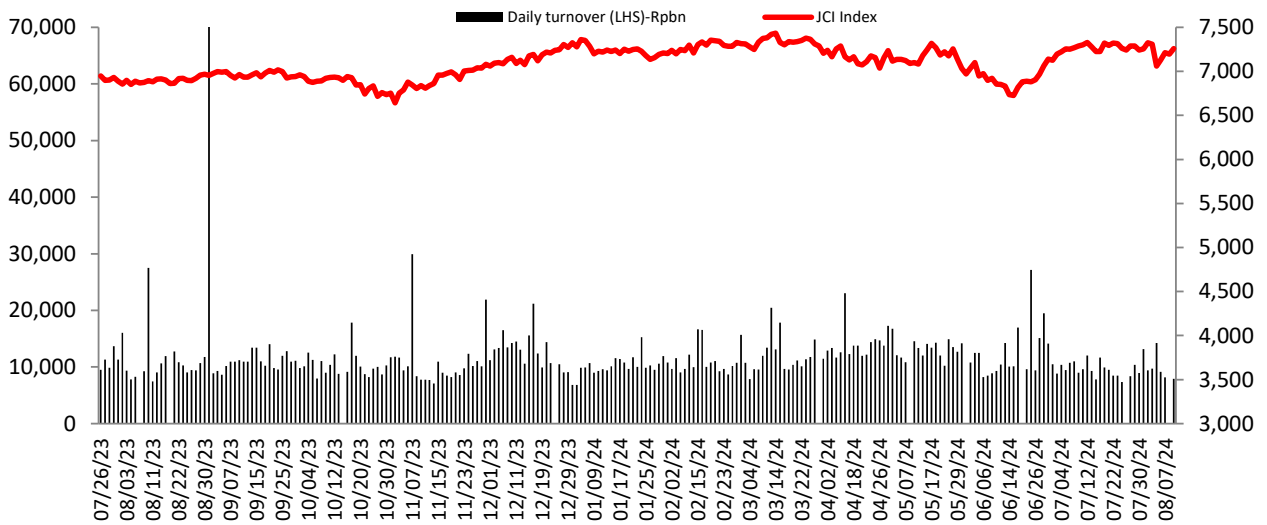
BOND MARKET

FLAT

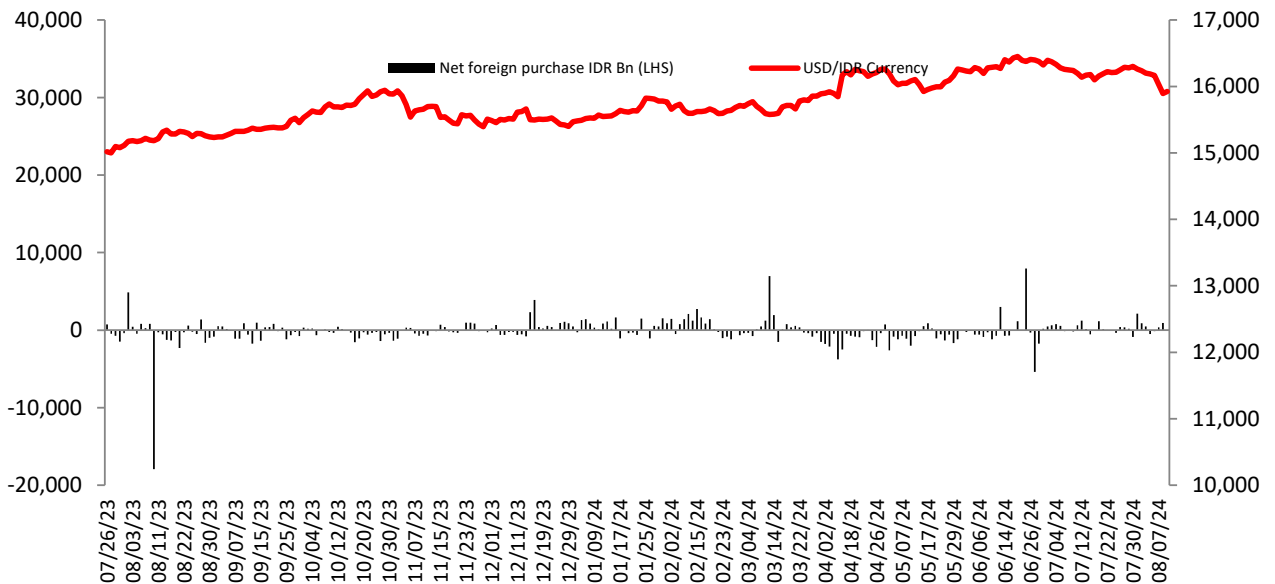
Indonesia bond market closed the week relatively flat today. We saw mixed trading although bond market general direction was bullish with several profit takers came to market. However, there was no significant price movement in the market with only limited trading was seen. Market was mostly dominated by local banks perhaps affected by the SG holiday. The 5Y/10Y/15Y/20Y benchmark closed the week at mid-yield of 6.59%/6.76%/6.87%/6.93%.

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	96.4	0.0	0.1	5Y
FR91	FR0091 Govt	97.8	0.1	(1.2)	10Y
FR93	FR0093 Govt	96.9	0.2	(1.2)	15Y
FR92	FR0092 Govt	102.1	0.1	(1.7)	20Y
PBS036	INDOIS 5 ¾ 08/15/25	98.9	#VALUE!	0.8	15-8-2025
PBS003	INDOIS 6 01/15/27	98.4	0.0	0.5	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.3	0.0	(0.0)	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.0	0.9	(0.8)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,257.0	0.9	(0.2)	
Thailand	SET Index	1,298.6	0.2	(8.3)	
Korean Stock Exch.	KOSPI Index	2,588.4	1.2	(2.5)	
Straight Times	FSSTI Index	3,261.8	0.4	0.7	
Kuala Lumpur	KLCI Index	1,596.1	0.4	9.7	
Philippines	PCOMP Index	6,647.8	1.5	3.1	
Nikkei	NKY Index	35,025.0	0.6	4.7	
Hang Seng	HSI Index	17,090.2	1.2	0.3	
MSCI-Asia pacific	MXAP Index	172.8	(0.7)	2.0	
<u>Global Indices</u>					
Dow Jones	INDU Index	39,446.5	1.8	4.7	
S&P 500	SPX Index	5,319.3	2.3	11.5	
Nasdaq	CCMP Index	16,660.0	2.9	11.0	
FTSE 100	UKX Index	8,199.9	0.7	6.0	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,925.0	(0.2)	(3.3)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,943.5	(1.0)	3.4
3 month	IDSWT3M Index	15,942.2	(1.0)	(3.2)
6 month	IDSWT6M Index	15,963.5	(0.7)	(3.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,959.5	(1.1)	(3.3)
6 month	IDFWT6M Index	16,046.0	(0.8)	(3.4)

*price as of 8/9/2024



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