

FOR PROFESSIONAL INVESTORS - 10/23/2024

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Flat

JCI was flat and closed at 7,788 (-1 points or -0.02%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 2.7Tn today and rupiah slightly weakened to IDR 15,620/USD.

Banking stocks were mixed as BBKA (+1.43%), BBNI (+0.44%), and PNB (+1.05%) closed higher, while MEGA (-0.4%) and BBRI (-0.82%) declined. Consumer names were mostly positive as INDF (+1.01%), ICBP (+0.6%), SIDO (+1.53%), and UNVR (+0.43%) all up, except KLBF (-0.3%). Mining stocks were negative as TINS (-3.6%), INCO (-1.41%), ANTM (-1.2%), PTBA (-2.96%), and ADRO (-1.07%) all closed lower. Poultry names were positive as CPIN (+1.7%), JPFA (+4.13%), and MAIN (+4.22%) all advanced. Other movers were BIPI (+26.76%), ENRG (+18.75%), PANI (-4.58%), and EMTK (-3.76%).

Indonesia Palm Oil Association (Gapki) General Chairman Eddy Martono stated that the B50 biodiesel program needs to be supported by the more realization of smallholder replanting activities (PSR) as B50 will consume approximately 11.5mn ton CPO.

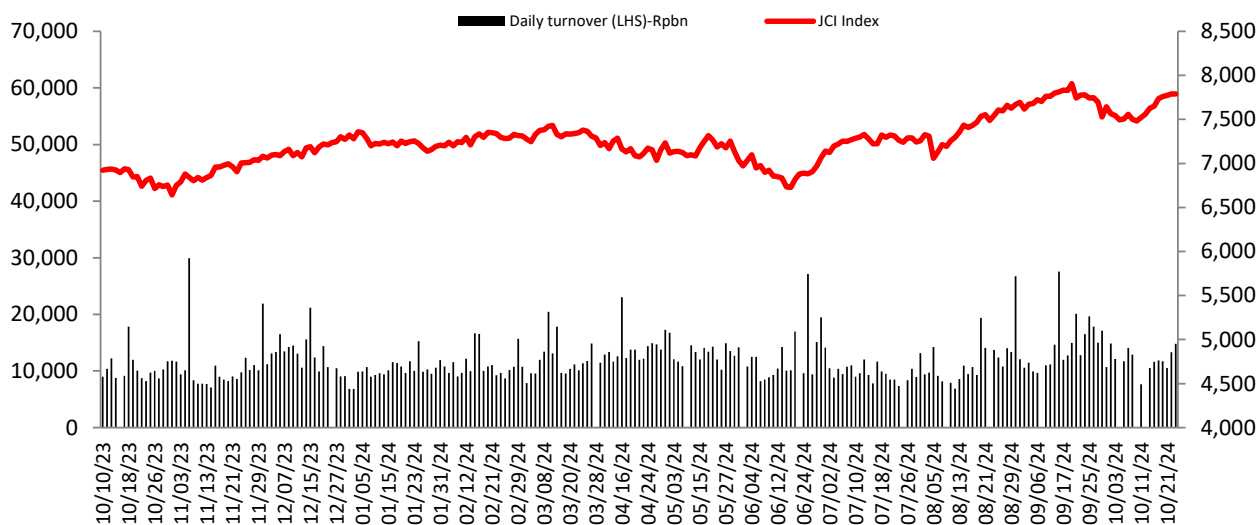
BOND MARKET

SELLING CONTINUES

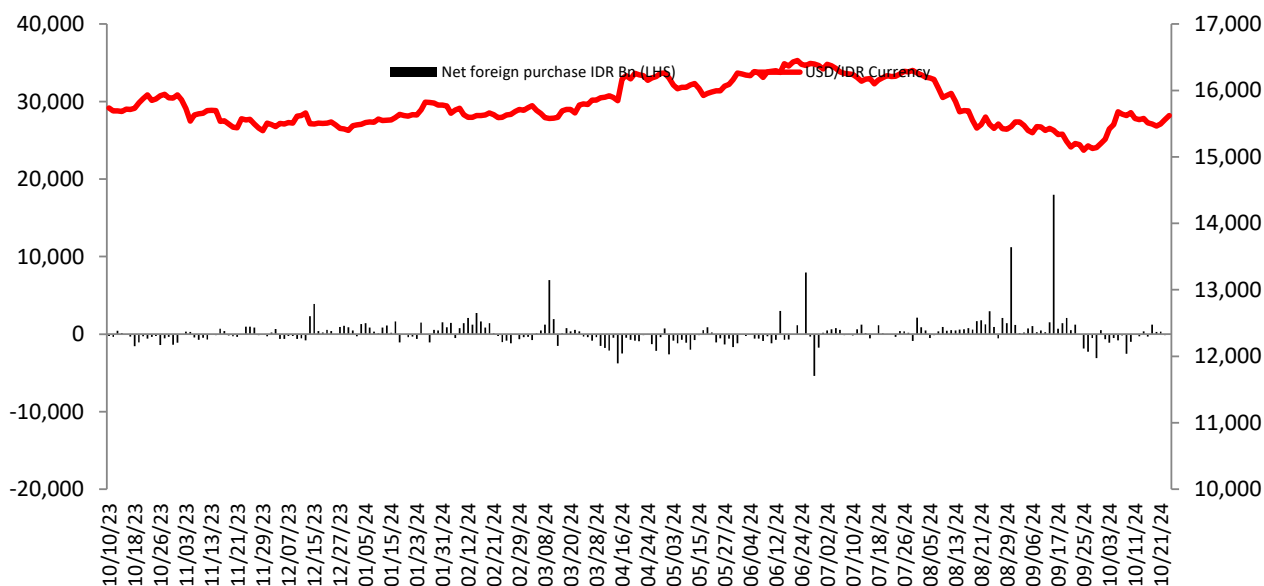
IndoGB market continues to trading lower today with overall yield curve closed higher by 4 – 8 bps. Selling interest from mixed players remains thick in the air especially on front to middle areas following higher 10Y UST yield and weaker local currency. Nearing lunch time, we have seen local names has taken the opportunity to collecting at the bottom. However this support failed to lift the prices. By end of the day, the benchmark series of 5/10/15/20Y closed the day at mid yield 6.61%/6.77%/6.97%/6.99%. Spot closed at 15,626.

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	97.2	(0.1)	1.0	5Y
FR91	FR0091 Govt	98.1	(0.5)	(0.9)	10Y
FR93	FR0093 Govt	95.7	(1.6)	(2.5)	15Y
FR92	FR0092 Govt	102.2	(0.0)	(1.6)	20Y
PBS036	INDOIS 5 ¾ 08/15/25	99.4	0.0	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	100.8	0.0	0.5	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	7,787.6	(0.0)	7.1	
Thailand	SET Index	1,470.3	(1.2)	3.8	
Korean Stock Exch.	KOSPI Index	2,599.6	1.1	(2.1)	
Straight Times	FSSTI Index	3,599.3	0.3	11.1	
Kuala Lumpur	KLCI Index	1,641.5	(0.1)	12.8	
Philippines	PCOMP Index	7,367.7	(0.6)	14.2	
Nikkei	NKY Index	38,104.9	(0.8)	13.9	
Hang Seng	HSI Index	20,760.2	1.3	21.8	
MSCI-Asia pacific	MXAP Index	188.3	(1.0)	11.2	
<u>Global Indices</u>					
Dow Jones	INDU Index	42,924.9	(0.0)	13.9	
S&P 500	SPX Index	5,851.2	(0.0)	22.7	
Nasdaq	CCMP Index	18,573.1	0.2	23.7	
FTSE 100	UKX Index	8,284.1	(0.3)	7.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,620.0	(0.4)	(1.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,565.0	0.6	1.0
3 month	IDSWT3M Index	15,546.2	0.5	(0.6)
6 month	IDSWT6M Index	15,558.6	0.6	(0.9)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,577.4	0.5	(0.9)
6 month	IDFWT6M Index	15,597.0	0.3	(0.5)

*price as of 10/23/2024



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