

FOR PROFESSIONAL INVESTORS - 01/11/2024

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Slide Lower

JCI slightly weakened and closed at 7,220 (-7 points or -0.1%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 86Bn today and rupiah slightly strengthened to IDR 15,549/USD.

Banking stocks were mostly positive as BBRI (+0.88%), BMRI (+0.39%), BBCA (+0.26%), and BBTN (+1.87%) all up, except MEGA (-0.48%). Consumer names were mixed as KLBF (+0.95%) and HMSP (+1.15%) inched higher, while KAEF (-5.63%), MYOR (-0.82%), and ICBP (-1.98%) declined. Material stocks were negative as BRPT (-4.93%) and TPIA (-7.25%) all closed lower. Mining names were negative as ITMG (-0.65%), PTBA (-1.13%), INCO (-1.44%), ADRO (-0.41%), and ANTM (-1.21%) all corrected. Other movers were BULL (+12.35%), APIC (+6.32%), BUMI (-5.21%), and PANI (-2.62%).

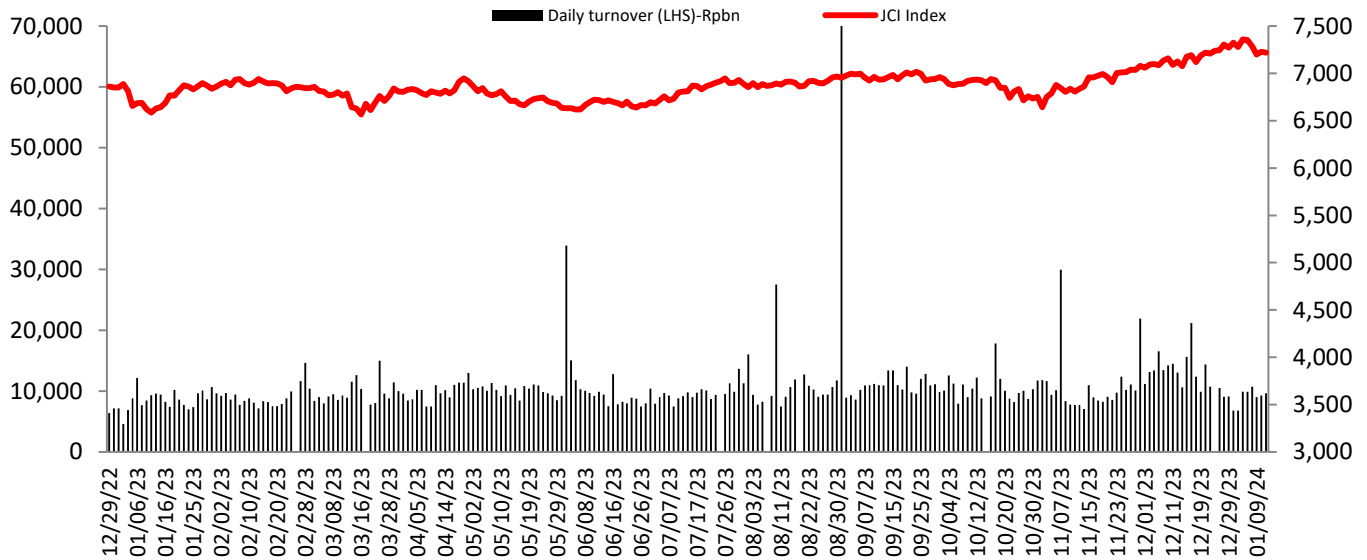
BOND MARKET

Better Sentiment

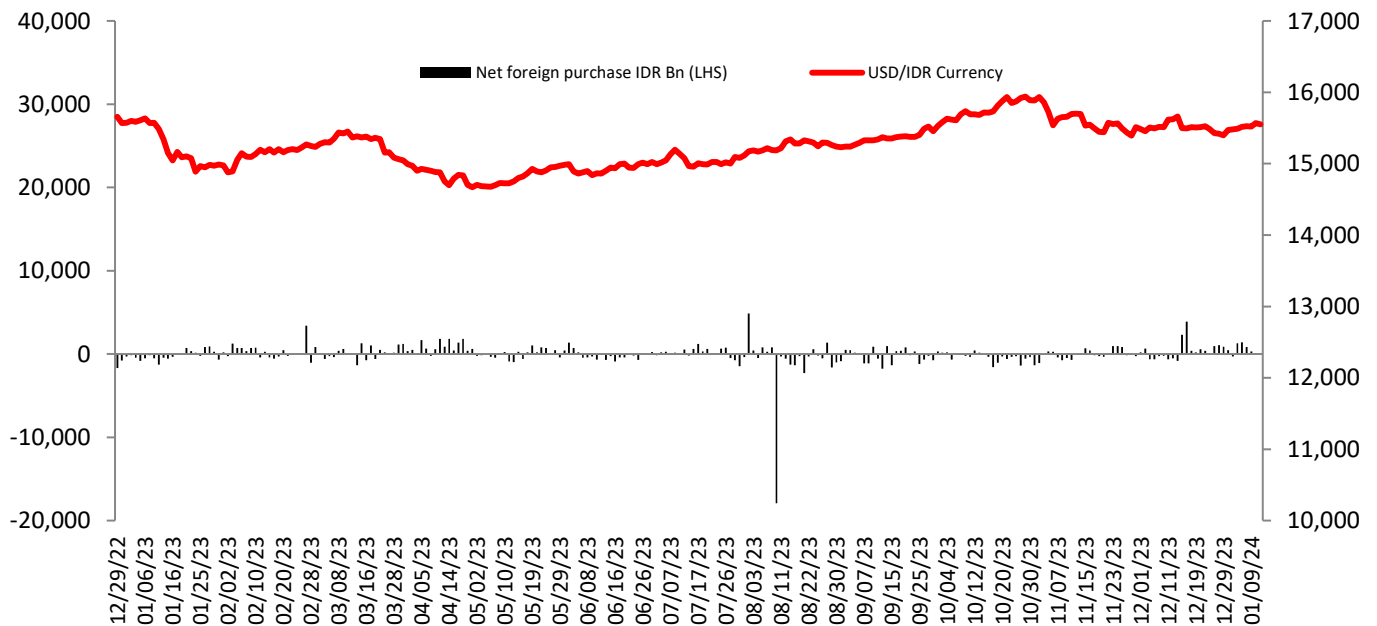
Indonesia bond market closed the day in positive tone triggered by the 5year tenor, suspected due to some overnight transactions. After bond market opened in wide spread, market players was seen biddish throughout the day inline with rupiah strengthened to below 15,550 and 10Y UST hit below 4%. Local and offshore players was heard aggressively bidding. Overall bonds yield closed lower by 5 - 9 bps today.

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	0.2	0.2	5Y
FR91	FR0091 Govt	98.2	0.0	(0.9)	10Y
FR93	FR0093 Govt	97.9	0.0	(0.5)	15Y
FR92	FR0092 Govt	102.7	(0.0)	(1.1)	20Y
PBS036	INDOIS 5 % 08/15/25	98.2	(0.1)	0.1	15-8-2025
PBS003	INDOIS 6 01/15/27	98.3	0.0	0.4	15-01-2027
PBS037	INDOIS 6 % 03/15/36	101.0	0.2	0.7	15-03-2036
PBS033	INDOIS 6 % 06/15/47	98.0	(0.3)	(0.8)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,220.0	(0.1)	(0.7)	
Thailand	SET Index	1,408.2	(0.4)	(0.5)	
Korean Stock Exch.	KOSPI Index	2,540.3	(0.1)	(4.3)	
Straight Times	FSSTI Index	3,201.4	0.7	(1.2)	
Kuala Lumpur	KLCI Index	1,483.0	(0.3)	1.9	
Philippines	PCOMP Index	6,613.7	1.0	2.5	
Nikkei	NKY Index	35,049.9	1.8	4.7	
Hang Seng	HSI Index	16,302.0	1.3	(4.4)	
MSCI-Asia pacific	MXAP Index	165.0	(0.1)	(2.6)	
<u>Global Indices</u>					
Dow Jones	INDU Index	37,695.7	0.5	0.0	
S&P 500	SPX Index	4,783.5	0.6	0.3	
Nasdaq	CCMP Index	14,969.7	0.8	(0.3)	
FTSE 100	UKX Index	7,661.1	0.1	(0.9)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,549.0	0.1	(1.0)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,561.6	0.4	1.0
3 month	IDSWT3M Index	15,574.9	0.4	(0.8)
6 month	IDSWT6M Index	15,566.6	0.3	(0.9)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,575.8	0.3	(0.8)
6 month	IDFWT6M Index	15,557.0	0.1	(0.3)

*price as of 1/11/2024



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