



FOR PROFESSIONAL INVESTORS - 09/20/2024

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Correction

JCI weakened and closed at 7,743 (-162 points or -2.05%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 2.1Tn today and rupiah advanced to IDR 15,150/USD.

Banking stocks were mostly negative as BBNI (-1.29%), BBRI (-0.46%), BBCA (-1.15%), and BMRI (-1.35%) all weakened, except PNBK (+1.74%). Consumer names were mixed as ICBP (+2.56%), INDF (+1.06%), and MYOR (+1.8%) inched higher, while KLBF (-0.58%) and HMSP (-10.07%) corrected. Material stocks were negative as BRPT (-10.88%) and TPIA (-10.56%) all weakened. Retailer names were mostly positive as MAPI (+3.93%), ACES (+7.32%), and MAPA (+1.06%) all inched higher, except LPPF (-1.24%). Other movers were PTBA (+6.12%), SMSM (+5.39%), FREN (-10%), and FILM (-6.94%).

Ministry of energy and mineral resources expects electricity consumption to continue increase and reach 6,500kWh per capita by 2060, compared to the target this year set at 1,408kWh per capita.

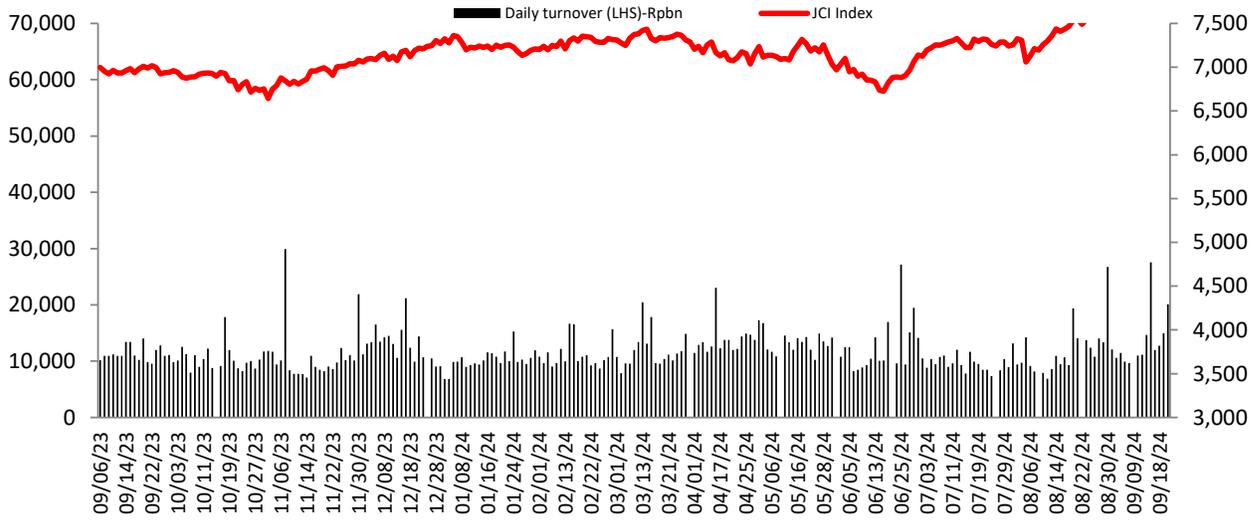
### BOND MARKET

#### EXTENDED BUYING

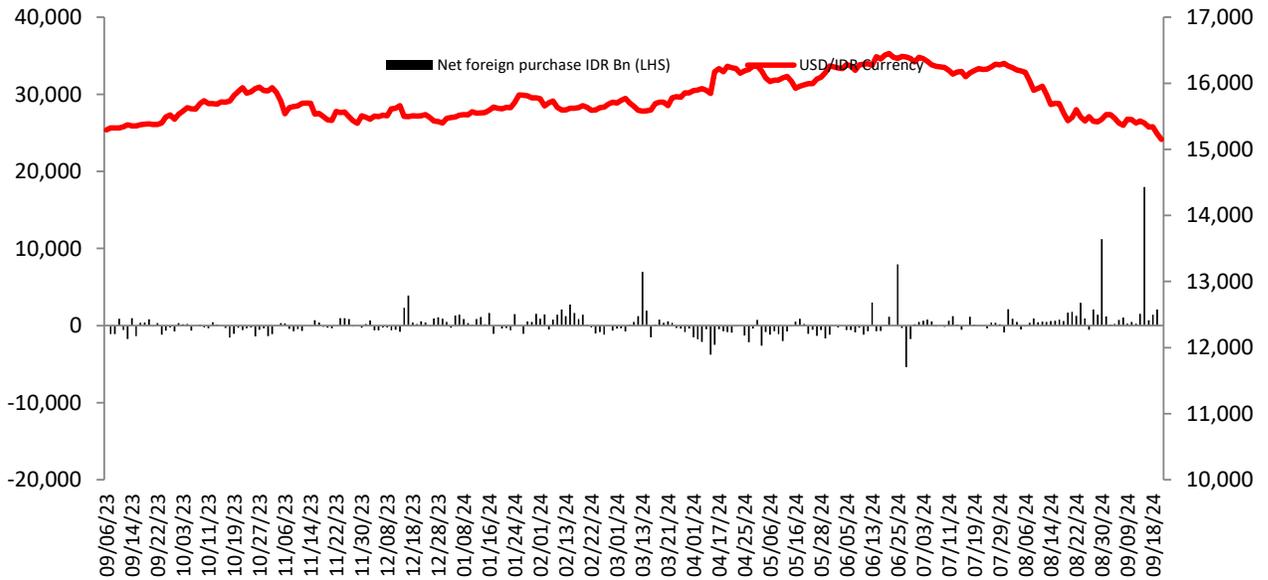
The bond market advanced further today on the back of solid interest from both onshore and offshore players. Buying boosted prices level across the board. Significant price increase soon invited profit takers in market. Market closed with yields lower by 5 – 8 bps compared to yesterday closing level. The benchmark series of 5, 10, 15 and 20Y closed the week at mid yield of 6.17%, 6.42%, 6.54% and 6.67% respectively. Spot opened at 15,125 and close 15,175.

# 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	0.1	1.1	5Y
FR91	FR0091 Govt	99.7	0.2	0.6	10Y
FR93	FR0093 Govt	97.6	#VALUE!	(0.5)	15Y
FR92	FR0092 Govt	103.8	0.3	(0.1)	20Y
PBS036	INDOIS 5 ¼ 08/15/25	99.2	0.0	1.1	15-8-2025
PBS003	INDOIS 6 01/15/27	99.1	#VALUE!	1.1	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.0	(0.0)	0.6	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.2	0.3	0.4	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,743.0	(2.1)	6.5	
Thailand	SET Index	1,453.8	(0.1)	2.7	
Korean Stock Exch.	KOSPI Index	2,593.4	0.5	(2.3)	
Straight Times	FSSTI Index	3,620.8	(0.3)	11.7	
Kuala Lumpur	KLCI Index	1,668.8	0.2	14.7	
Philippines	PCOMP Index	7,252.3	0.7	12.4	
Nikkei	NKY Index	37,723.9	1.5	12.7	
Hang Seng	HSI Index	18,258.6	1.4	7.1	
MSCI-Asia pacific	MXAP Index	185.5	1.3	9.5	
<u>Global Indices</u>					
Dow Jones	INDU Index	42,025.2	1.3	11.5	
S&P 500	SPX Index	5,713.6	1.7	19.8	
Nasdaq	CCMP Index	18,014.0	2.5	20.0	
FTSE 100	UKX Index	8,265.2	(0.8)	6.9	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,150.0	0.6	1.6
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,270.1	(0.6)	(0.9)
3 month	IDSWT3M Index	15,273.3	(0.5)	1.1
6 month	IDSWT6M Index	15,273.5	(0.5)	1.0
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,269.1	(0.6)	1.2
6 month	IDFWT6M Index	15,366.1	(0.6)	1.0

\*price as of 9/20/2024

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