

FOR PROFESSIONAL INVESTORS - 09/11/2024

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Flat

JCI was flat and closed at 7,761 (0 points or -0.01%) today. Shares across regional markets were negative. Meanwhile, foreign investors recorded net inflow of IDR 231Bn today and rupiah slightly strengthened to IDR 15,400/USD.

Banking stocks were mixed as BMRI (+1.72%) and BBKA (+0.72%) closed higher, while MEGA (-0.7%), BBNI (-0.88%), and BBRI (-1.43%) corrected. Consumer names were mixed as HMSP (+2.72%) and SIDO (+3.82%) inched higher, while UNVR (-0.9%), INDF (-0.71%), and KLBF (-1.15%) weakened. Material stocks were mixed as BRPT (+8.18%) advanced, while TPIA (-3.5%) retreated. Pulp & paper names were negative as TKIM (-2.01%) and INKP (-2.34%) all declined. Other movers were MLPT (+25%), LIFE (+19.8%), MSIN (-10.94%), and KPIG (-4.4%).

Retail sales survey by Bank Indonesia suggests the Retail Sales Index (IPR) in Aug-24 was recorded at 215.9, grew by +5.8% YoY. On monthly basis, retail sales rose +1.6% MoM, after contracted by -7.2% MoM in the previous month.

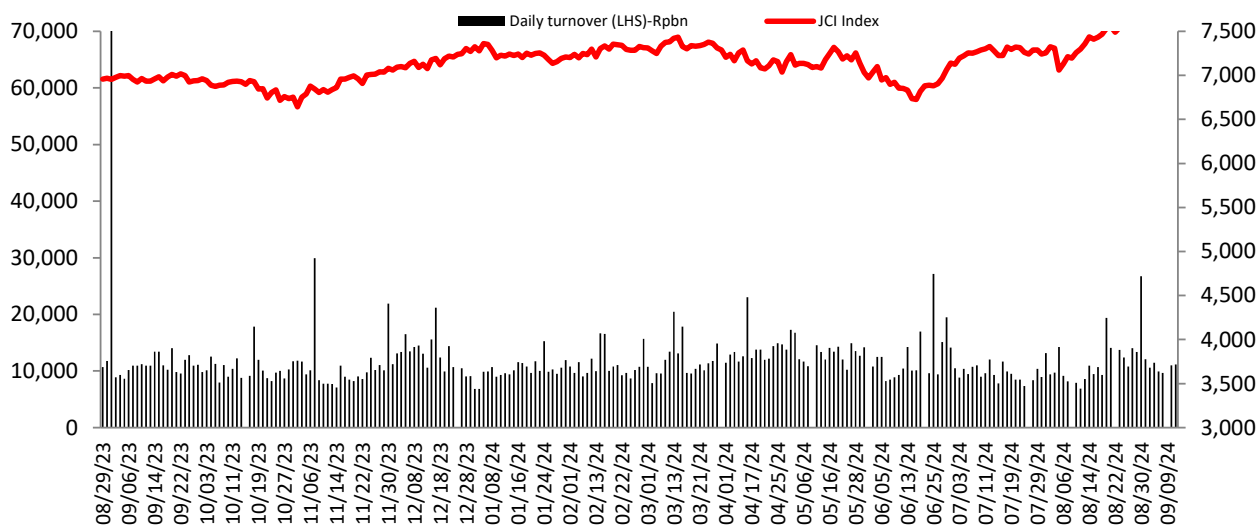
BOND MARKET

Buy and Sell

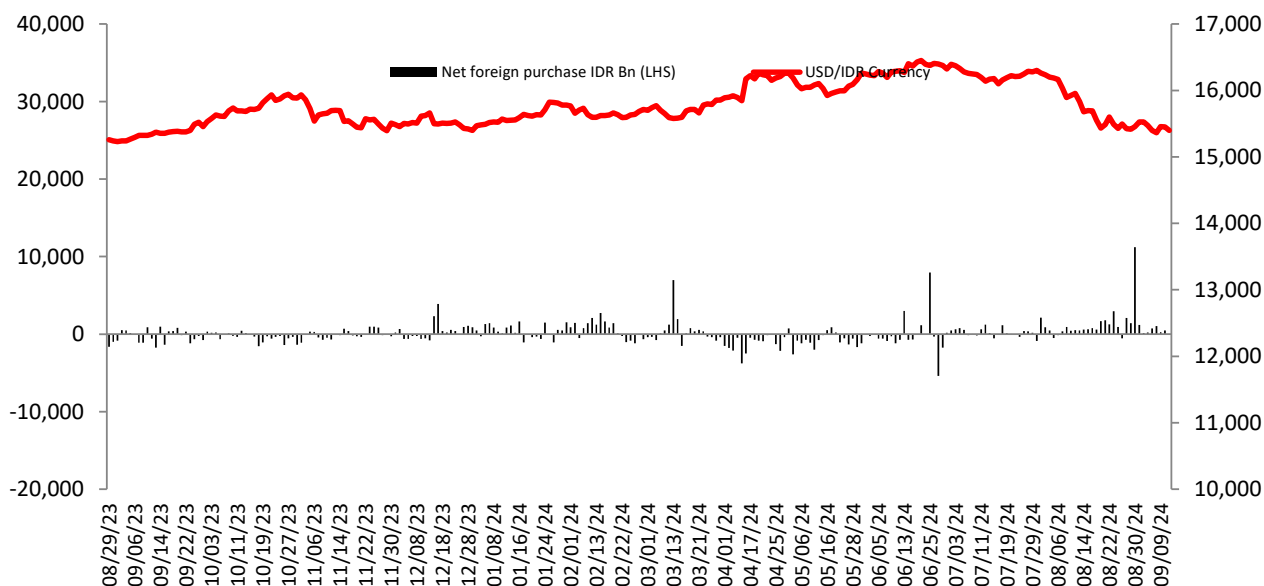
Indonesia bond market closed the day with lower yield around 2 – 5 ahead of US CPI data tonight and bring 10Y UST yield down below 3.64%. As soon as market opened, bullish tone was thick in the air. The 5Y FR101 and 10Y FR100 got traded as high as 101.65 (6.45%) and 100.4 (6.56%). Significant price increase soon invited profit takers in market. The benchmark series of 5, 10, 15 and 20Y closed the week at mid yield of 6.45%, 6.56%, 6.68% and 6.75% respectively

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	97.1	0.0	0.9	5Y
FR91	FR0091 Govt	98.7	0.1	(0.4)	10Y
FR93	FR0093 Govt	97.5	0.0	(0.6)	15Y
FR92	FR0092 Govt	103.2	0.1	(0.6)	20Y
PBS036	INDOIS 5 ½ 08/15/25	99.2	#VALUE!	1.1	15-8-2025
PBS003	INDOIS 6 01/15/27	98.9	0.0	0.7	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.0	(0.0)	0.7	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.0	(0.0)	(0.8)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,761.0	(0.0)	6.7	
Thailand	SET Index	1,414.3	(1.0)	(0.1)	
Korean Stock Exch.	KOSPI Index	2,513.4	(0.4)	(5.3)	
Straight Times	FSSTI Index	3,531.2	0.5	9.0	
Kuala Lumpur	KLCI Index	1,639.8	(1.2)	12.7	
Philippines	PCOMP Index	6,944.9	(0.6)	7.7	
Nikkei	NKY Index	35,619.8	(1.5)	6.4	
Hang Seng	HSI Index	17,108.7	(0.7)	0.4	
MSCI-Asia pacific	MXAP Index	179.9	(0.1)	6.2	
<u>Global Indices</u>					
Dow Jones	INDU Index	40,737.0	(0.2)	8.1	
S&P 500	SPX Index	5,495.5	0.4	15.2	
Nasdaq	CCMP Index	17,025.9	0.8	13.4	
FTSE 100	UKX Index	8,191.3	(0.2)	5.9	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,400.0	0.3	(0.0)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,452.0	0.1	0.3
3 month	IDSWT3M Index	15,446.8	(0.0)	0.0
6 month	IDSWT6M Index	15,445.0	0.0	(0.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,488.9	0.1	(0.3)
6 month	IDFWT6M Index	15,560.0	0.5	(0.3)

*price as of 9/11/2024



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* PT BNP Asset Management (address: Sequis Tower, Lantai 29, Jl. Jend. Sudirman Kav. 71, SCBD Lot 11B, Jakarta 12190 - INDONESIA).

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