

FOR PROFESSIONAL INVESTORS - 11/05/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

FLATTISH

JCI was flat and closed at 6,582 (-5 points or -0.07%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 1,100Bn today (including crossings) and rupiah was stabilized at IDR 14,328/USD.

Banking stocks were mixed as BBKA (+1.02%) and MEGA (+1.88%) rose, while BBNI (-0.71%), BBRI (-0.24%), and BMRI (-1.05%) corrected. Consumer names were mixed as MYOR (+2.1%) and HMSP (+0.5%) in green, while KAEF (-1.59%), INDF (-0.4%), and UNVR (-0.45%) weakened. Infra stocks were mixed as TOWR (+4.35%) and TBIG (+1.09%) advanced, PGAS (-1.96%) closed lower, and JSMR unchanged. Properties names were negative as JRPT (-0.8%), PWON (-0.96%), SMRA (-2.11%), and BSDE (-2.22%) all closed lower. Other movers were BCIC (+29.95%), BNBA (+24.92%), POLL (-6.94%), and HRUM (-4.09%).

Nominal transactions using QRIS reached Rp2.9tn in September 2021, grew 248% YoY and as of early November there were 12.11 million merchants who had joined. QRIS transaction volume in the third quarter of 2021 was dominated by micro merchants at 38% followed by medium merchants at 31%. BI has also increased the maximum transaction ceiling from Rp2mn to Rp5mn.

BOND MARKET

LITTLE CHANGE

The bond market closed the week with slight improvement although prices continued to move within range. Market trading was active particularly in the morning session. Market players' interest was seen in 10Y tenor with interbank players were seen joining the buying activities. Some profit takers also came in to market and brought bond yields back to yesterday's level. Overall the yield closed the day lower by around 2 - 4 bps.

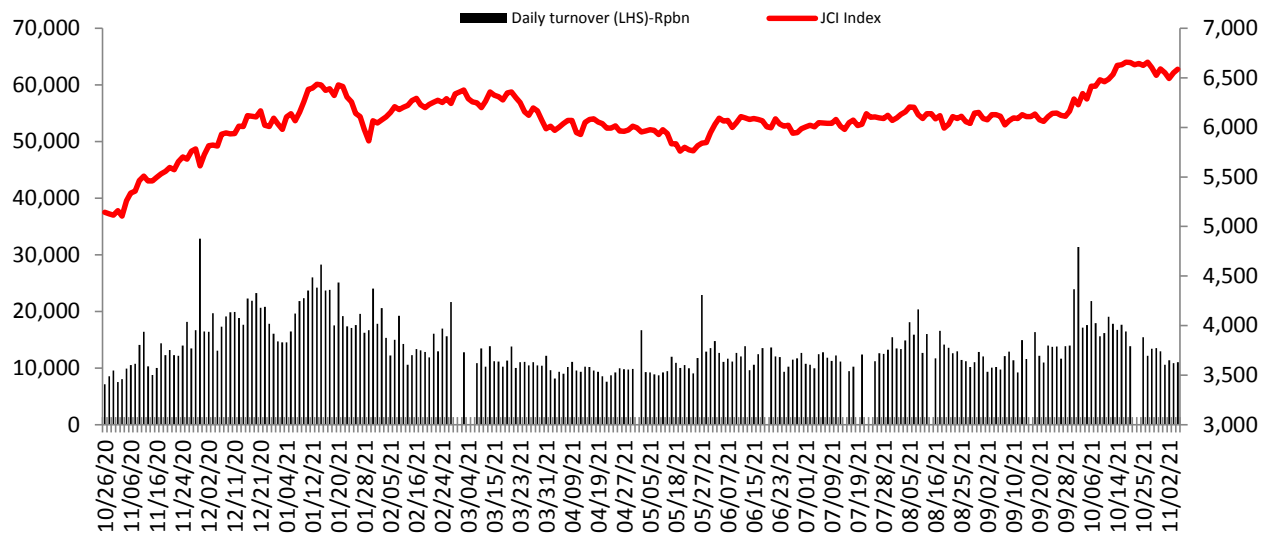


BNP PARIBAS
ASSET MANAGEMENT

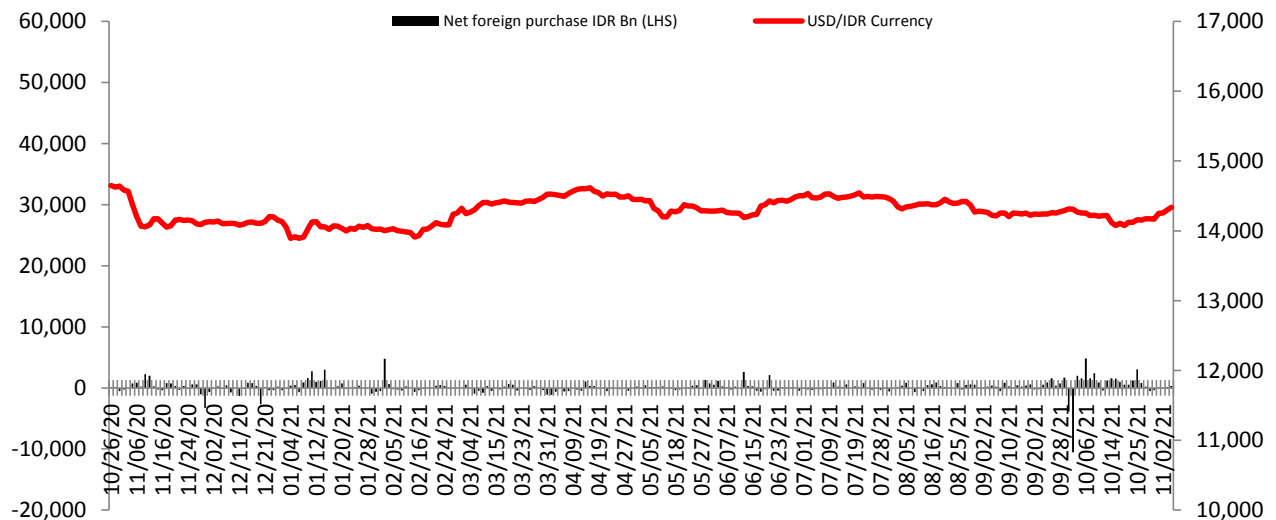
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GRAPHS & TABLES

JCI & DAILY TURNOVER



IDR & NET FOREIGN PURCHASES



EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
<u>Bonds</u>					
FR81	FR0081 Govt	101.7	0.0	0.0	5Y
FR82	FR0082 Govt	102.2	0.1	(2.5)	10Y
FR80	FR0080 Govt	100.2	0.2		15Y
FR83	FR0083 Govt	105.7	0.3	(4.6)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,581.8	(0.1)	10.1	
Thailand	SET Index	1,626.2	(0.0)	12.2	
Korean Stock Exch.	KOSPI Index	2,969.3	(0.5)	3.3	
Straight Times	FSSTI Index	3,242.3	0.7	14.0	
Kuala Lumpur	KLCI Index	1,531.7	0.0	(5.9)	
Philippines	PCOMP Index	7,340.8	1.9	2.8	
Nikkei	NKY Index	29,611.6	(0.6)	7.9	
Hang Seng	HSI Index	24,870.5	(1.4)	(8.7)	
MSCI-Asia pacific	MXAP Index	199.2	0.7	(0.3)	
<u>Global Indices</u>					
Dow Jones	INDU Index	36,124.2	(0.1)	18.0	
S&P 500	SPX Index	4,680.1	0.4	24.6	
Nasdaq	CCMP Index	15,940.3	0.8	23.7	
FTSE 100	UKX Index	7,310.9	0.4	13.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,328.0	0.1	(1.9)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,323.7	0.1	1.7
3 month	IDSWT3M Index	14,293.1	0.2	(1.4)
6 month	IDSWT6M Index	14,314.1	0.0	(1.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,389.2	0.3	(1.6)
6 month	IDFWT6M Index	14,538.1	0.9	(0.9)

*price as of 11/4/2021

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