

FOR PROFESSIONAL INVESTORS - 10/11/2021

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### SLIDE DOWN

JCI slightly weakened and closed at 6,460 (-22 points or -0.34%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 904Bn today and rupiah slightly strengthened to IDR 14,208/USD.

Banking stocks were mixed as BBNI (+4.07%), BBRI (+0.48%), and MEGA (+0.86%) rose, while BDMN (-1.77%) and BBCA (-0.48%) declined. Consumer names were mostly negative as KLBF (-1.45%), GGRM (-2.31%), MYOR (-3.31%), and HMSP (-1.79%) all weakened, except UNVR (+1.47%). Material stocks were negative as BRPT (-4.15%) and TPIA (-3.41%) all down. Mining names were positive as ADRO (+5.51%), ITMG (+7.65%), ANTM (+3.42%), INCO (+4.04%), and INDY (+6.45%) all advanced. Other movers were MDKA (+12.77%), EXCL (+6.67%), MASA (-6.79%), and FREN (-5.94%).

During 9M21, the asset under management (AUM) of the mutual fund industry shrank by Rp21.78tn to Rp551.76tn. One of the reasons is the decrease in AUM of protected mutual funds (-32.9%).

### BOND MARKET

#### 10Y UST AT 1.61%

Indonesia bond market start the week 15 – 25 bps weaker on the back of 10Y UST yield touched 1.61% after US NFP announcement last Friday. Mixed players show mixed interest throughout the day. Thin trading volume during the day pushed bidders to be more defensive and IDR bonds still traded within range. The benchmark series 5Y/10Y/15Y/20Y closed at mid-yield of 5.2%/6.36%/6.35%/7.27% respectively. There will be fresh supply tomorrow as Indonesia Debt Management Office ("DMO") will hold conventional bond auction with IDR 8Tn issuance target with max upside to IDR 12Tn. The series that will be issued are 3M SPN, 12M SPN, 6Y FR90, 11Y FR91, 15Y FR88, 21Y FR92 and 30Y FR89. In the previous conventional auction, incoming bids reached IDR 58.829Tn and DMO issued IDR 12Tn.

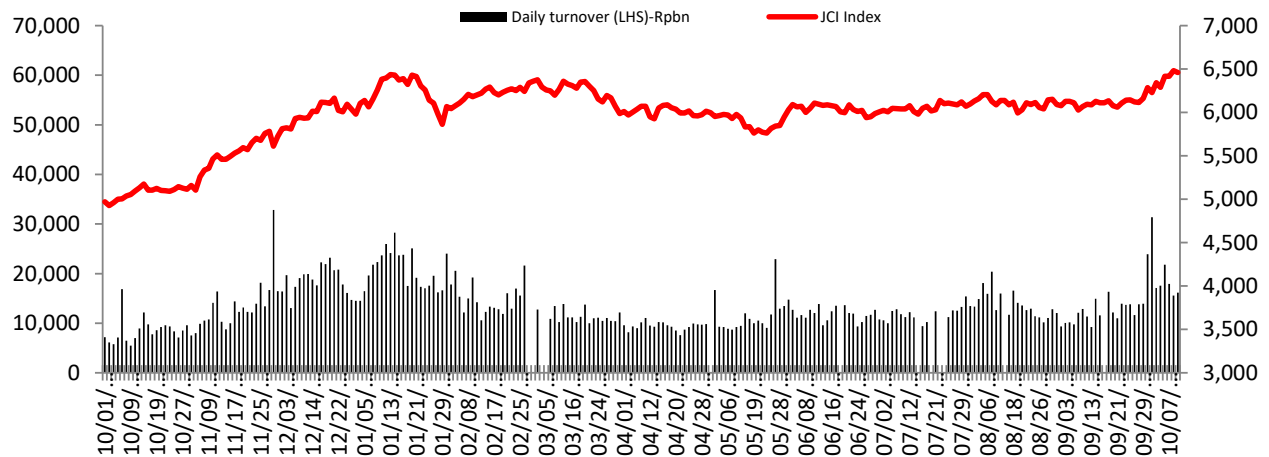


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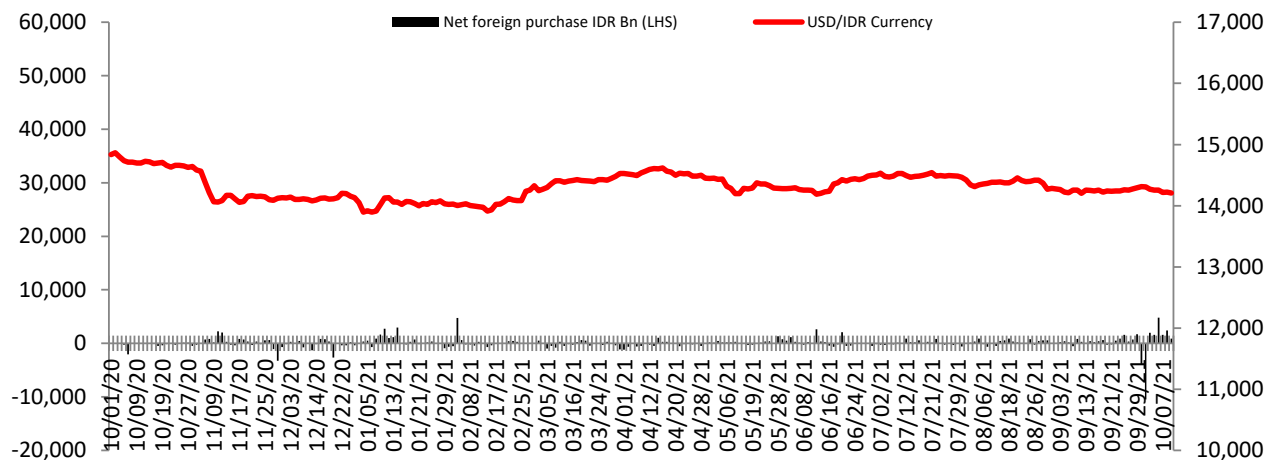
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## GRAPHS & TABLES

### 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	101.4	(0.0)	(0.3)	5Y
FR82	FR0082 Govt	101.2	(0.3)	(3.4)	10Y
FR80	FR0080 Govt	99.3	0.0		15Y
FR83	FR0083 Govt	104.1	(0.2)	(6.0)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,417.3	2.1	7.3	
Thailand	SET Index	1,619.5	(0.3)	11.7	
Korean Stock Exch.	KOSPI Index	2,908.3	(1.8)	1.2	
Straight Times	FSSTI Index	3,083.9	0.5	8.4	
Kuala Lumpur	KLCI Index	1,559.4	1.9	(4.2)	
Philippines	PCOMP Index	7,057.5	1.1	(1.2)	
Nikkei	NKY Index	27,528.9	(1.1)	0.3	
Hang Seng	HSI Index	23,966.5	(0.6)	(12.0)	
MSCI-Asia pacific	MXAP Index	192.5	(0.8)	(3.7)	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,098.4	(0.6)	11.4	
S&P 500	SPX Index	4,318.7	(0.6)	15.0	
Nasdaq	CCMP Index	14,375.2	(0.4)	11.5	
FTSE 100	UKX Index	7,004.3	(1.0)	8.4	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,253.0	0.0	(1.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,250.0	(0.2)	1.1
3 month	IDSWT3M Index	14,255.5	(0.1)	(1.1)
6 month	IDSWT6M Index	14,256.4	(0.1)	(1.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,392.0	0.2	(1.6)
6 month	IDFWT6M Index	14,440.2	(0.2)	(0.2)

\*price as of 10/5/2021


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