



FOR PROFESSIONAL INVESTORS - 09/19/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### SLIGHT REBOUND

JCI slightly strengthened and closed at 7,195 (+27 points or +0.37%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net inflow of IDR 1.9Tn today and rupiah slightly weakened to IDR 14,978/USD.

Banking stocks were mostly positive as BBKA (+2.37%), BBRI (+1.56%), BMRI (+1.37%), and BBNI (+0.28%) all inched higher, except PNBK (-2.73%). Consumer names were mixed as SDO (+4.93%) and ICBP (+0.58%) up, while UNVR (-0.65%), INDF (-1.59%), and KLBF (-1.32%) weakened. Telco stocks were positive as TLKM (+2.04%), EXCL (+2%), and ISAT (+1.77%) all up. Hospital names were mixed as HEAL (+5.09%) and MIKA (+0.75%) in green, while SILO (-0.46%) down. Other movers were AKRA (+4.46%), MSIN (+3.92%), BBHI (-6.99%), and BRMS (-6.8%).

SEA plans to fire 3% of Indonesia staff as layoff begins.

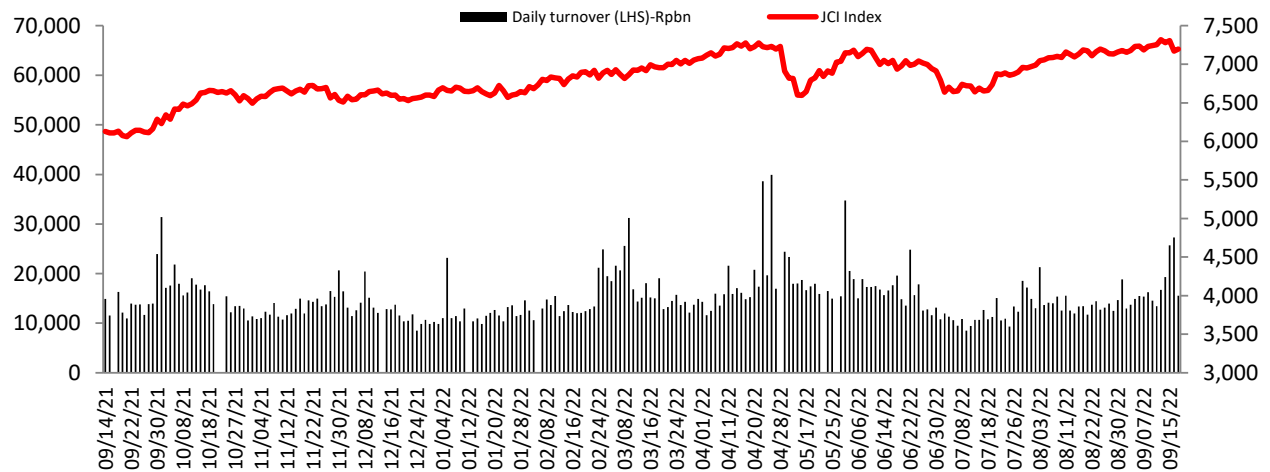
### BOND MARKET

#### QUIET

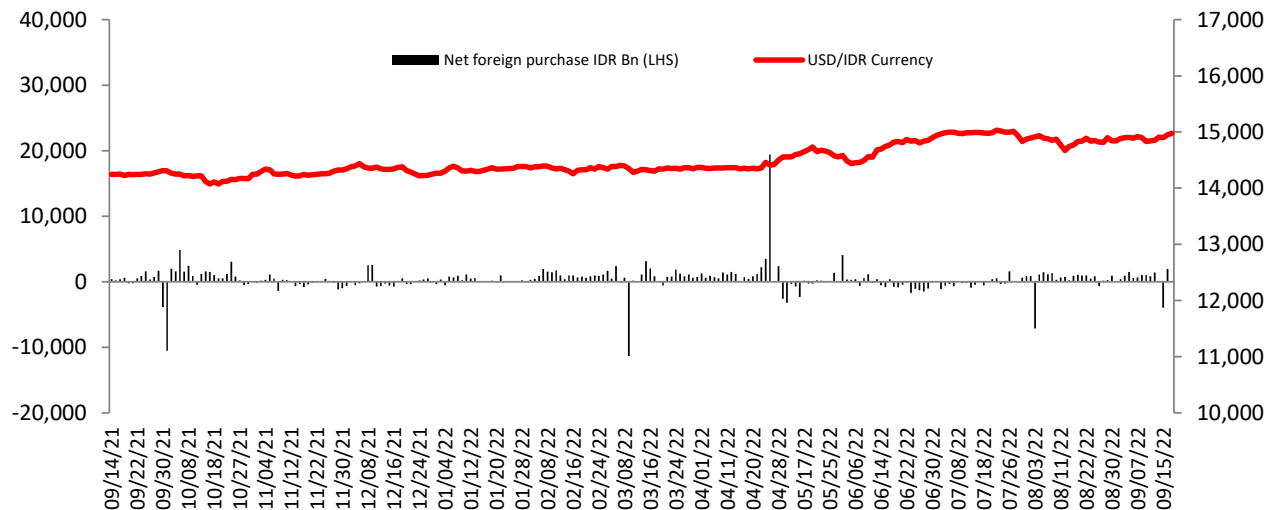
It was a quiet trading for bond market today with prices move in a tight range. Investors were comfortable stay sidelined lacking of any news to move the market. Small trades are seen on 5-10Y area with local investor heard on the buying side. Meanwhile, selling interest are seen in the front part of the curve with yield up by 12bps on the 1Y area. At the end of the day, yield curve closed mixed with movement around 1-3bps. Tomorrow, Indonesia Debt Management Office ("DMO") will hold regular Sukuk auction of 6M SPNS, 3Y PBS-036, 5Y PBS-003, 7Y PBSG-001, 12Y PBS-029 and 25Y PBS-033 with indicative target of IDR 9tn.

## 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	94.1	(0.0)	(6.8)	5Y
FR82	FR0082 Govt	94.4	0.0	(6.3)	10Y
FR80	FR0080 Govt	94.5	(0.3)		15Y
FR83	FR0083 Govt	98.9	(0.6)	(3.6)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,195.5	0.4	9.3	
Thailand	SET Index	1,634.2	0.2	(1.4)	
Korean Stock Exch.	KOSPI Index	2,355.7	(1.1)	(20.9)	
Straight Times	FSSTI Index	3,255.7	(0.4)	4.2	
Kuala Lumpur	KLCI Index	1,453.0	(1.0)	(7.3)	
Philippines	PCOMP Index	6,437.4	(1.7)	(9.6)	
Nikkei	NKY Index	27,567.7	(1.1)	(4.3)	
Hang Seng	HSI Index	18,566.0	(1.0)	(20.7)	
MSCI-Asia pacific	MXAP Index	150.3	(1.2)	(22.2)	
<u>Global Indices</u>					
Dow Jones	INDU Index	30,822.4	(0.5)	(15.2)	
S&P 500	SPX Index	3,873.3	(0.7)	(18.7)	
Nasdaq	CCMP Index	11,448.4	(0.9)	(26.8)	
FTSE 100	UKX Index	7,236.7	(0.6)	(2.0)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,978.0	(0.2)	(4.8)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,895.2	0.3	4.5
3 month	IDSWT3M Index	14,925.3	0.4	(4.6)
6 month	IDSWT6M Index	14,943.1	0.1	(4.7)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,960.1	0.4	(4.6)
6 month	IDFWT6M Index	14,964.4	0.1	(4.0)
			(0.5)	(4.1)

\*price as of 9/17/2022

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