

FOR PROFESSIONAL INVESTORS - 08/31/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Holding Up

JCI slightly strengthened and closed at 7,179 (+19 points or +0.27%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 42Bn today and rupiah was stabilized at IDR 14,843/USD.

Banking stocks were positive as BBRI (+1.88%), BMRI (+2.31%), MEGA (+9.09%), BBCA (+0.31%), and BBNI (+1.19%) all closed higher. Consumer names were mostly negative as MYOR (-1.64%), GGRM (-2.97%), ICBP (-4.87%), and INDF (-4.23%) all retreated, except KLBF (+3.07%). Retailer stocks were mixed as AMRT (+7.39%) and MAPI (+3.06%) in green, while MAPA (-2.02%) and ERAA (-3.37%) retreated. Telco names were mixed as TLKM (+1.79%) and FREN (+1.02%) rose, while EXCL (-3.66%) retreated. Other movers were BUMI (+5%), TPIA (+4.27%), MEDC (-4.97%), and ESSA (-4.7%).

The government is set to roll out three social aid schemes worth US\$1.62 billion (Rp 24.17 trillion) in a bid to strengthen people's buying power amid the risk of inflationary pressure, as a result of an expected subsidized fuel price hike.

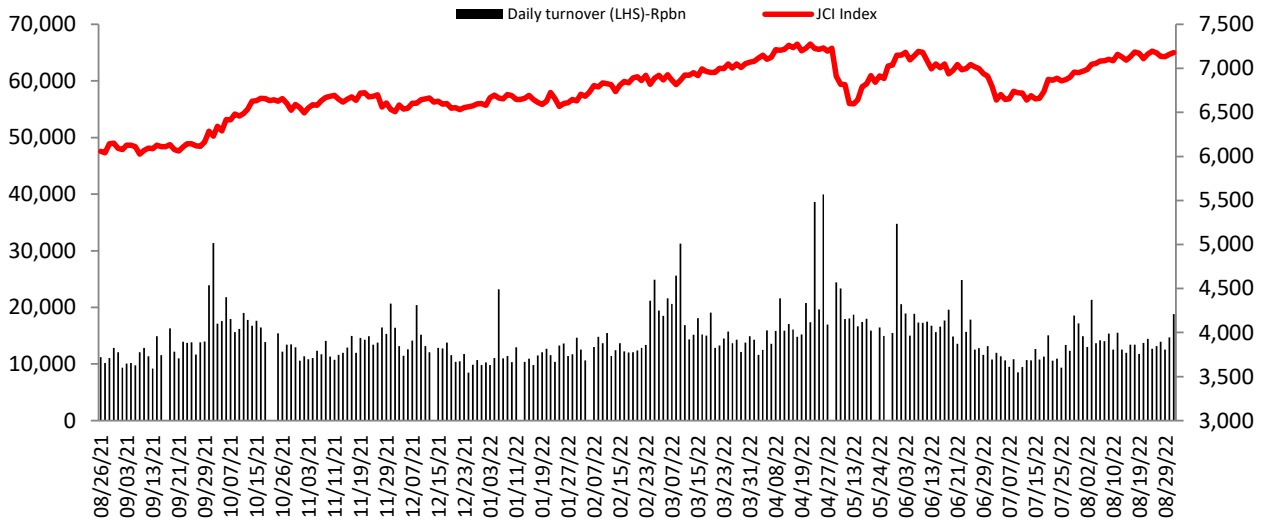
BOND MARKET

Little change

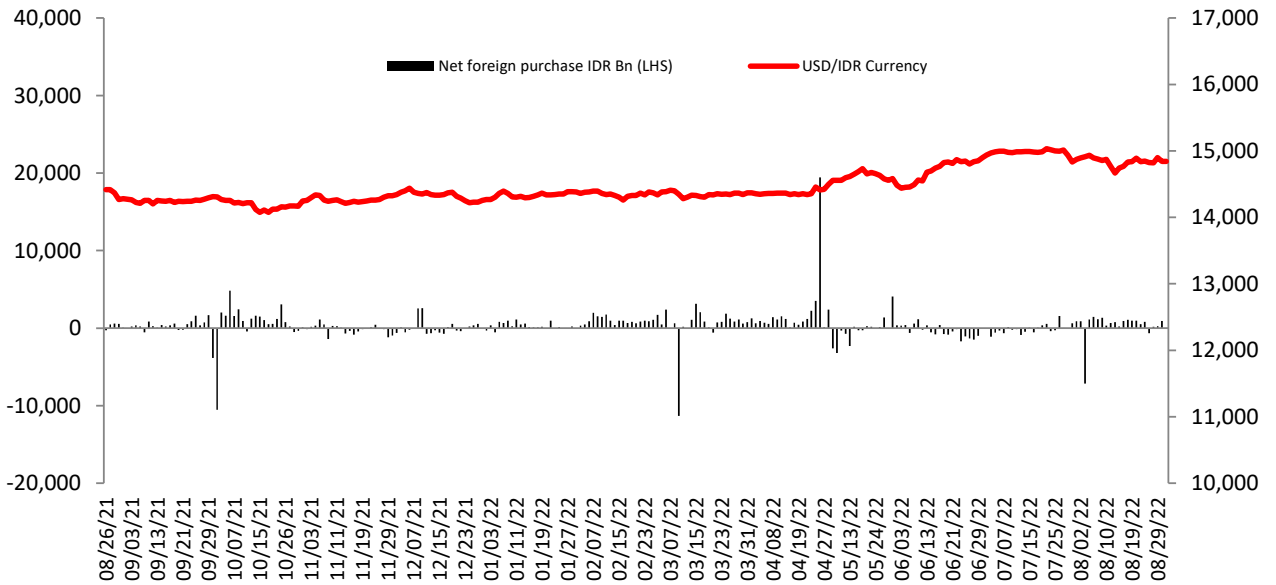
IDR bond market relatively quiet throughout the day with prices moved within range lacking fresh catalyst. There was no significant price movement in the market with trading seen in the front to belly tenor. Anxiety around fuel price hike uncertainties pushed players to place defensive bids. The yield curve closed with little change with benchmark series of 5Y/10Y/15Y/20Y closed at mid yield 6.59%/7.11%/7.07%/7.08%.

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	94.2	0.0	(6.6)	5Y
FR82	FR0082 Govt	95.0	(0.0)	(5.8)	10Y
FR80	FR0080 Govt	93.5	0.1		15Y
FR83	FR0083 Govt	100.3	0.3	(2.2)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,178.6	0.3	9.1	
Thailand	SET Index	1,634.4	(0.3)	(1.4)	
Korean Stock Exch.	KOSPI Index	2,472.1	0.9	(17.0)	
Straight Times	FSSTI Index	3,218.7	(0.6)	3.0	
Kuala Lumpur	KLCI Index	1,512.1	0.7	(3.5)	
Philippines	PCOMP Index	6,583.7	(1.6)	(7.6)	
Nikkei	NKY Index	28,091.5	(0.4)	(2.4)	
Hang Seng	HSI Index	19,954.4	0.0	(14.7)	
MSCI-Asia pacific	MXAP Index	158.1	0.6	(18.1)	
<u>Global Indices</u>					
Dow Jones	INDU Index	31,790.9	(1.0)	(12.5)	
S&P 500	SPX Index	3,986.2	(1.1)	(16.4)	
Nasdaq	CCMP Index	11,883.1	(1.1)	(24.0)	
FTSE 100	UKX Index	7,330.8	(0.4)	(0.7)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,843.0	0.0	(4.0)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,890.9	0.0	4.4
3 month	IDSWT3M Index	14,873.9	(0.2)	(4.2)
6 month	IDSWT6M Index	14,917.0	0.7	(4.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,880.0	(0.1)	(4.0)
6 month	IDFWT6M Index	14,902.9	(0.3)	(3.6)
				(3.3)

*price as of 8/31/2022

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