

FOR PROFESSIONAL INVESTORS - 10/27/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Staying Strong

JCI advanced and closed at 7,092 (+48 points or +0.68%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 897Bn today and rupiah was stabilized at IDR 15,568/USD.

Banking stocks were mostly positive as BBCA (+1.75%), BBRI (+1.55%), BBNI (+1.36%), and MEGA (+1.39%) all inched higher, except PNBK (-0.76%). Consumer names were mixed as HMSP (+4.98%), SIDO (+3.5%), and GGRM (+1.9%) up, while UNVR (-0.93%) and KLBF (-1.47%) corrected. Retailer stocks were positive as AMRT (+2.26%), MAPI (+5.49%), ACES (+6.54%), and ERAA (+3.88%) all rose. Material names were positive as BRPT (+4.97%) and TPIA (+1.26%) all rose. Other movers were BFIN (+8.46%), BTPS (+7.19%), ADHI (-5.6%), and BIPI (-4.14%).

Minister of SoE plans on merging PLN, Pertamina and Star Energy in order to support the expansion of renewable energy. He estimates that Indonesia has a potential in geothermal of 23.76GW and only 2.1GW is currently being developed.

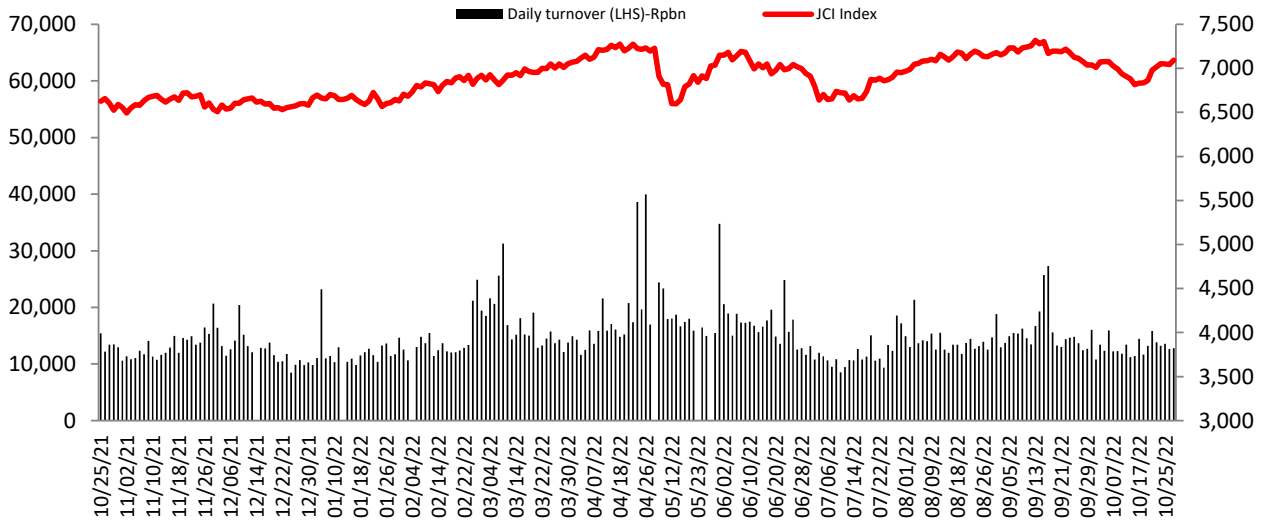
BOND MARKET

(Still) Firmer

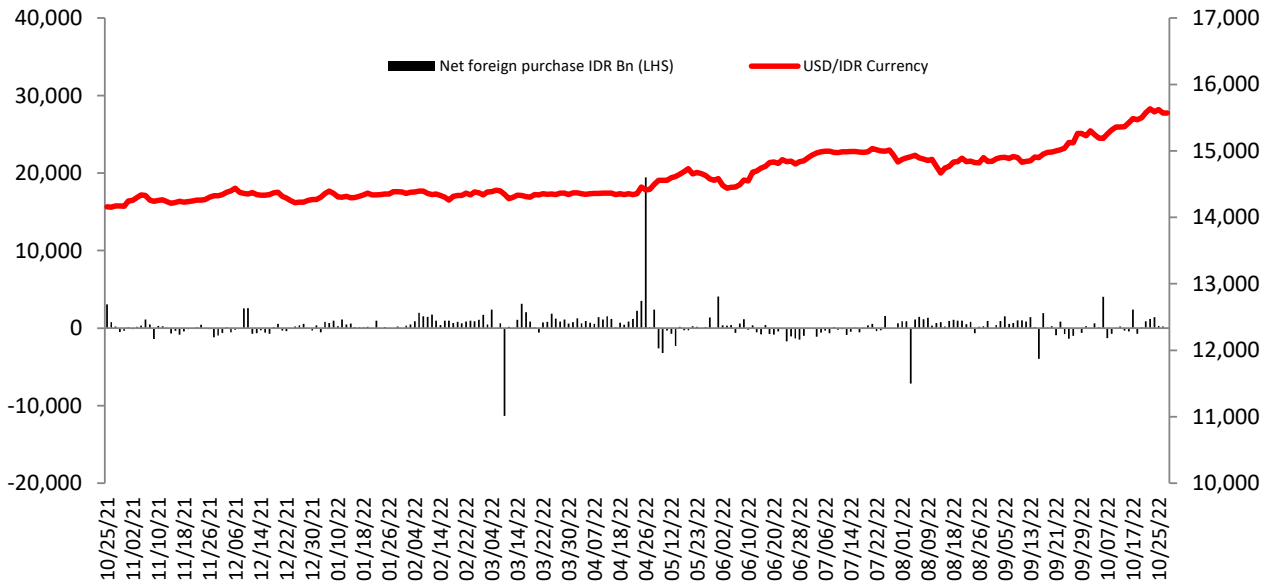
InDoGB opened firmer today following lower UST which briefly dipped below 4% overnight. Buying interest were seen led by 5Y FR90 and 15Y FR93 which got traded as high as 92.6 (7.08%) and 89.9 (7.52%) respectively. However, the good sentiment did not sustained till the end of the day as UST yield moved higher again in the afternoon session. Market went quiet and yield curve closed the day lower around 5-14bps. Tonight, market awaits for the US GDP data and ECB policy rate decision.

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	92.2	0.4	(8.6)	5Y
FR82	FR0082 Govt	92.2	0.4	(8.6)	10Y
FR80	FR0080 Govt	89.2	0.6		15Y
FR83	FR0083 Govt	94.9	0.3	(7.5)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,091.8	0.7	7.8	
Thailand	SET Index	1,603.0	0.4	(3.3)	
Korean Stock Exch.	KOSPI Index	2,288.8	1.7	(23.1)	
Straight Times	FSSTI Index	3,019.4	0.4	(3.3)	
Kuala Lumpur	KLCI Index	1,454.1	(0.1)	(7.2)	
Philippines	PCOMP Index	6,230.6	1.8	(12.5)	
Nikkei	NKY Index	27,345.2	(0.3)	(5.0)	
Hang Seng	HSI Index	15,427.9	0.7	(34.1)	
MSCI-Asia pacific	MXAP Index	137.3	1.3	(28.9)	
<u>Global Indices</u>					
Dow Jones	INDU Index	31,839.1	0.0	(12.4)	
S&P 500	SPX Index	3,830.6	(0.7)	(19.6)	
Nasdaq	CCMP Index	10,971.0	(2.0)	(29.9)	
FTSE 100	UKX Index	7,081.1	0.4	(4.1)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,568.0	0.0	(8.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,615.7	0.1	9.5
3 month	IDSWT3M Index	15,602.4	(0.1)	(9.3)
6 month	IDSWT6M Index	15,599.0	0.3	(9.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,601.8	(0.2)	(9.1)
6 month	IDFWT6M Index	15,710.0	0.9	(9.2)
				(9.5)

*price as of 10/27/2022

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