



FOR PROFESSIONAL INVESTORS - 04/07/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### REBOUNDED

JCI slightly strengthened and closed at 7,127 (+23 points or +0.33%) today. Shares across regional markets were negative. Meanwhile, foreign investors recorded net inflow of IDR 539Bn today and rupiah was stabilized at IDR 14,359/USD.

Banking stocks were mixed as BBRI (+0.65%), BBNI (+1.84%), and BMRI (+0.33%) rose, while BBTN (-1.78%) and MEGA (-0.79%) closed lower. Consumer names were mixed as ICBP (+2.36%) and MYOR (+1.75%) inched higher, while GGRM (-1.2%), UNVR (-0.83%), and KLBF (-0.94%) down. Retailer stocks were mostly negative as MAPI (-1.17%), ERAA (-4.39%), and AMRT (-5.28%) all retreated, except ACES (+1.86%). Telco names were mixed as TLKM (+2.48%) and FREN (+6.49%) up, while EXCL (-1.48%) retreated. Other movers were BBHI (+9.55%), MSIN (+5.99%), EMTK (-3.13%), and BUMI (-3.08%).

The Ministry of Manpower is preparing a policy instrument for implementing wage subsidies (BSU) 2022, with a budget of Rp8.8tn. This assistance will be given to workers with wages below Rp3.5mn/month with an allocation of Rp1mn.

### BOND MARKET

#### SOME SUPPORT

Indonesia bond market painted a different story today. Bond market received some bullish tone from local players which put pressure on prices hence lifted yield down 2 – 3 bps, focus was heard on the short to middle tenor. While in the afternoon session, the market saw less trading. Yield curve closed slightly lower with mid-yield 5Y/10Y/15Y/20Y at 5.65%/6.76%/6.7%/7.14%. Meanwhile total foreign ownership in local currency government bonds up to IDR 856.879Tn on Apr 06, 2022 from previously IDR 848.285Tn on Mar 31, 2022.

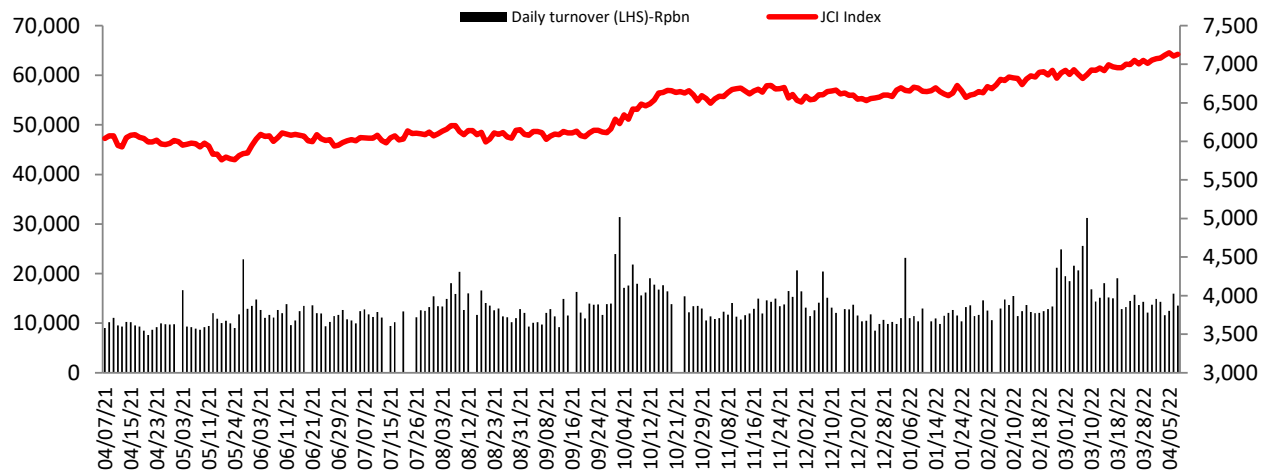


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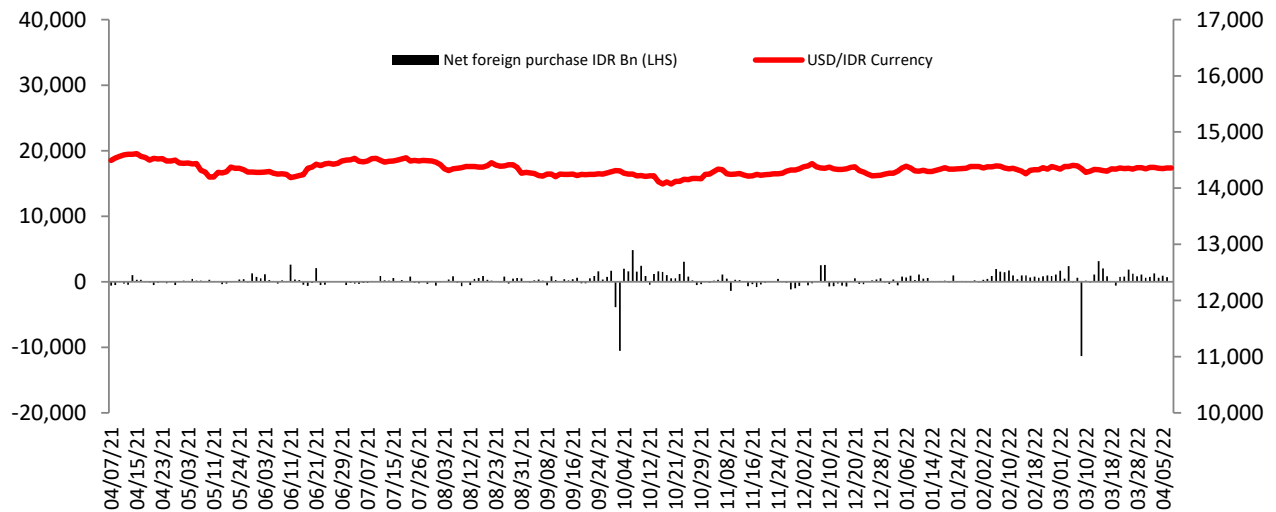
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## GRAPHS & TABLES

### JCI & DAILY TURNOVER



### IDR & NET FOREIGN PURCHASES



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## EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
<u>Bonds</u>					
FR81	FR0081 Govt	97.7	(0.0)	(3.1)	5Y
FR82	FR0082 Govt	97.1	0.0	(3.6)	10Y
FR80	FR0080 Govt	96.9	(0.2)		15Y
FR83	FR0083 Govt	99.6	0.1	(3.0)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,127.4	0.3	8.3	
Thailand	SET Index	1,684.0	(1.0)	1.6	
Korean Stock Exch.	KOSPI Index	2,695.9	(1.4)	(9.5)	
Straight Times	FSSTI Index	3,407.5	(0.5)	9.1	
Kuala Lumpur	KLCI Index	1,600.8	(0.2)	2.1	
Philippines	PCOMP Index	6,926.0	(2.6)	(2.8)	
Nikkei	NKY Index	26,888.6	(1.7)	(6.6)	
Hang Seng	HSI Index	21,809.0	(1.2)	(6.8)	
MSCI-Asia pacific	MXAP Index	178.8	(1.5)	(7.4)	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,496.5	(0.4)	(5.1)	
S&P 500	SPX Index	4,481.2	(1.0)	(6.0)	
Nasdaq	CCMP Index	13,888.8	(2.2)	(11.2)	
FTSE 100	UKX Index	7,566.0	(0.3)	2.5	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,359.0	(0.0)	(0.7)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,345.0	(0.1)	0.6
3 month	IDSWT3M Index	14,361.1	0.1	(0.6)
6 month	IDSWT6M Index	14,363.5	0.1	(0.7)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,356.5	(0.1)	(0.4)
6 month	IDFWT6M Index	14,437.3	(0.3)	(0.4)
			(0.1)	(0.8)

\*price as of 4/7/2022


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\* PT BNP Asset Management (address: Sequis Tower, 29<sup>th</sup> Floor, Jl. Jend. Sudirman Kav. 71, SCBD Lot 11B, Jakarta 12190 - INDONESIA).

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