



FOR PROFESSIONAL INVESTORS - 08/11/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### REBOUNDED

JCI advanced and closed at 7,160 (+74 points or +1.05%) today. Shares across regional markets were positive. Meanwhile, foreign investors recorded net inflow of IDR 657Bn today and rupiah advanced to IDR 14,768/USD.

Banking stocks were mostly positive as BBRI (+0.93%), BBKA (+0.63%), BBNI (+0.59%), and BBTN (+2.94%) all closed higher, except BMRI (-0.87%). Consumer names were mostly negative as SIDO (-0.65%), INDF (-0.38%), UNVR (-0.63%), and KLBF (-0.94%) all down, except ICBP (+1.72%). Properties stocks were positive as CTRA (+4.35%), PWON (+4.7%), SMRA (+5.69%), and LPKR (+1.96%) all closed higher. Mining names were mostly positive as ANTM (+5.66%), INCO (+5.32%), ADRO (+0.32%), and TINS (+2.61%) all rose, except ITMG (-6.7%). Other movers were BUMI (+7.52%), ESSA (+7.14%), MSIN (-3.76%), and BMTR (-3.23%).

Ministry of public works and housing (PUPR) is hoping that the Rp5.4tn budget for the development of the new Nusantara capital city (IKN) could be disbursed in August 2022 so that construction activities could be started this year.

### BOND MARKET

#### RALLY

Indonesia bond market traded in biddish tone today with lower yield around 15 - 20 bps following last night's lower-than-estimated US CPI data. Buying interest was seen as local currency traded lower at 14,794/801 level compare to yesterday closing at 14,870/80 level. Solid interest that came from local and foreign banks gave further support to the market, while local players were seen taking profit. However, the profit taking failed to hold the level. Price increase was led by 10Y FR91 which hit lowest yield at 6.94%. The most traded bonds today is 1Y – 10Y areas.

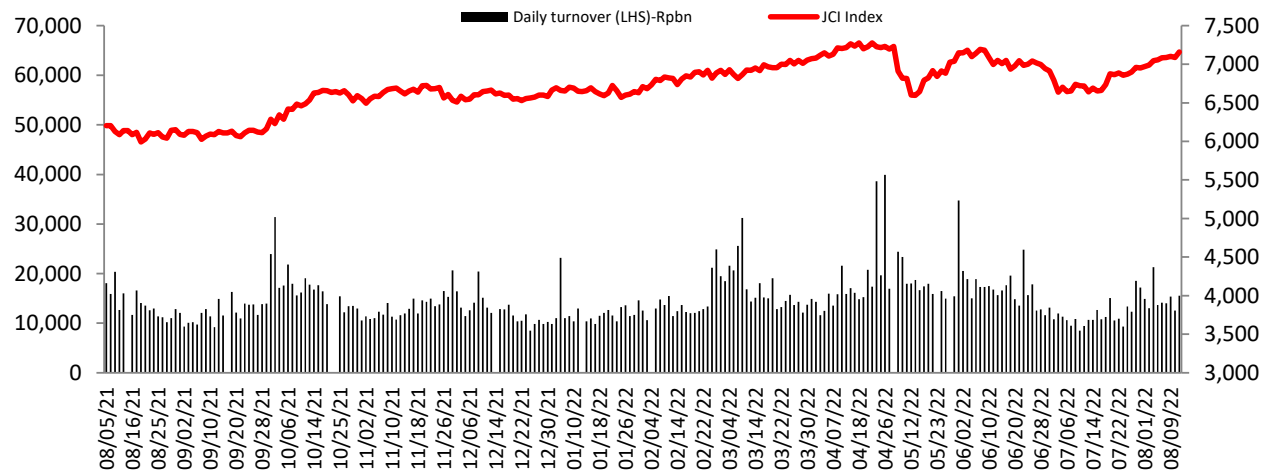


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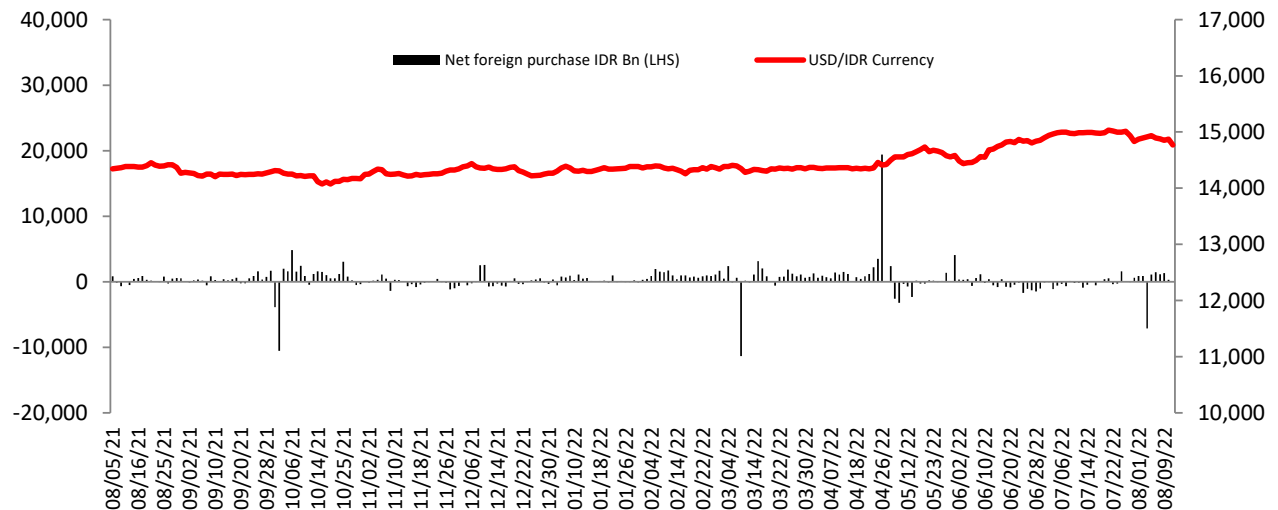
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## GRAPHS & TABLES

### 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    | 95.2     | 0.4        | (5.6)      | 5Y    |
| FR82                  | FR0082 Govt    | 95.8     | 0.7        | (5.0)      | 10Y   |
| FR80                  | FR0080 Govt    | 94.7     | 0.3        |            | 15Y   |
| FR83                  | FR0083 Govt    | 99.6     | (0.0)      | (2.9)      | 20Y   |
| <u>Asia Pacific</u>   |                |          |            |            |       |
| Jakarta Composite     | JCI Index      | 7,160.4  | 1.0        | 8.8        |       |
| Thailand              | SET Index      | 1,618.0  | 0.0        | (2.4)      |       |
| Korean Stock Exch.    | KOSPI Index    | 2,523.8  | 1.7        | (15.2)     |       |
| Straight Times        | FSSTI Index    | 3,301.3  | 0.5        | 5.7        |       |
| Kuala Lumpur          | KLCI Index     | 1,501.1  | 0.6        | (4.2)      |       |
| Philippines           | PCOMP Index    | 6,680.7  | 3.2        | (6.2)      |       |
| Nikkei                | NKY Index      | 27,819.3 | (0.6)      | (3.4)      |       |
| Hang Seng             | HSI Index      | 20,082.4 | 2.4        | (14.2)     |       |
| MSCI-Asia pacific     | MXAP Index     | 160.4    | 0.2        | (17.0)     |       |
| <u>Global Indices</u> |                |          |            |            |       |
| Dow Jones             | INDU Index     | 33,309.5 | 1.6        | (8.3)      |       |
| S&P 500               | SPX Index      | 4,210.2  | 2.1        | (11.7)     |       |
| Nasdaq                | CCMP Index     | 12,854.8 | 2.9        | (17.8)     |       |
| FTSE 100              | UKX Index      | 7,499.3  | (0.1)      | 1.6        |       |

|                    | Bloomberg Code | IDR      | % Chg. D-D | % Chg. YTD |
|--------------------|----------------|----------|------------|------------|
| Spot IDR           | IDR Curncy     | 14,768.0 | 0.7        | (3.5)      |
| <u>Swap-IDR</u>    |                |          |            |            |
| 1 month            | IDSWT1M Index  | 14,895.0 | 0.2        | 4.5        |
| 3 month            | IDSWT3M Index  | 14,873.9 | 0.1        | (4.2)      |
| 6 month            | IDSWT6M Index  | 14,873.0 | 0.1        | (4.2)      |
| <u>Forward-IDR</u> |                |          |            |            |
| 3 month            | IDFWT3M Index  | 14,858.0 | (0.3)      | (3.9)      |
| 6 month            | IDFWT6M Index  | 14,909.0 | 0.1        | (3.6)      |
|                    |                |          |            | (4.1)      |

\*price as of 8/11/2022


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