

FOR PROFESSIONAL INVESTORS - 06/17/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

TUMBLLED

JCI weakened and closed at 6,937 (-113 points or -1.61%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net outflow of IDR 782Bn today and rupiah slightly weakened to IDR 14,823/USD.

Banking stocks were mostly negative as BBNI (-0.91%), BBKA (-0.99%), BBRI (-1.35%), and BMRI (-3.58%) all declined, except MEGA (+0.93%). Consumer names were mostly negative as GGRM (-1.06%), ICBP (-1.44%), HMSP (-3.29%), and UNVR (-3.13%) all declined, except INDF (+0.37%). Mining stocks were negative as ITMG (-2.45%), ANTM (-1.86%), PTBA (-2.36%), INCO (-2.82%), and ADRO (-4.58%) all retreated. Retailer names were negative as ACES (-2.9%), LPPF (-4.14%), MAPI (-3.85%), and AMRT (-1.37%) all retreated. Other movers were BIPI (+25.64%), BUMI (+8.33%), ISAT (-6.91%), and MDKA (-6.82%).

Banks – Sector loans growth reached 9.1% YoY in April 2022. OJK is expecting loans growth to be at 6.5-9.5% in 2022 and 7.5-9.5% in 2023.

BOND MARKET

SLIGHTLY HIGHER

The mixed sentiment was extended today as Indonesia bond market closed the week with higher yield around 3 - 9 bps. Market players were cautious ahead of some event on the next week, SUN auction on Tuesday and BI rate meeting on Thursday. Local names were still in the buy side and mixed names were on the sell side. The most favorite series was still on middle areas, for both benchmark and non-benchmark series. The benchmark series yield closed the week at mid yield 5Y/10Y/15Y/20Y at 6.62%/7.46%/7.44%/7.37%.

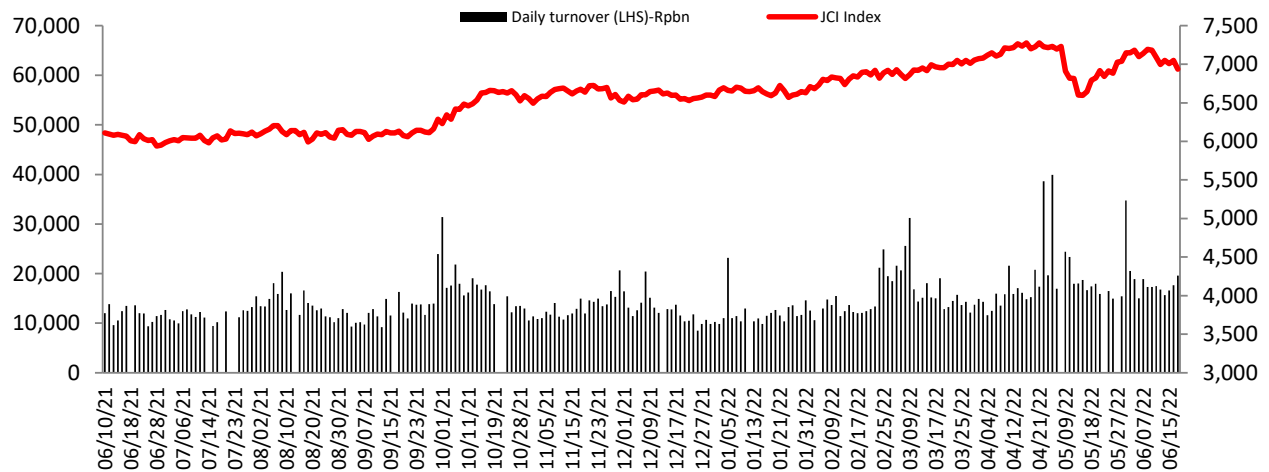


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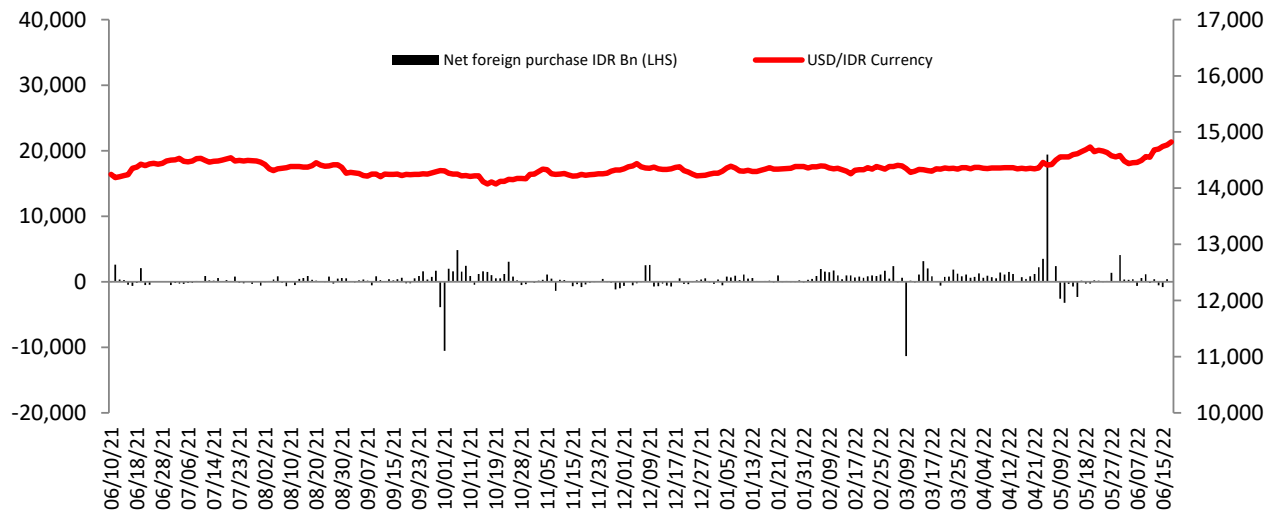
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GRAPHS & TABLES

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	94.0	(0.2)	(6.8)	5Y
FR82	FR0082 Govt	92.6	(0.5)	(8.1)	10Y
FR80	FR0080 Govt	90.1	0.1		15Y
FR83	FR0083 Govt	97.5	(0.0)	(5.0)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,937.0	(1.6)	5.4	
Thailand	SET Index	1,560.5	(0.0)	(5.9)	
Korean Stock Exch.	KOSPI Index	2,440.9	(0.4)	(18.0)	
Straight Times	FSSTI Index	3,086.5	(0.4)	(1.2)	
Kuala Lumpur	KLCI Index	1,456.7	(1.1)	(7.1)	
Philippines	PCOMP Index	6,331.6	(1.0)	(11.1)	
Nikkei	NKY Index	25,963.0	(1.8)	(9.8)	
Hang Seng	HSI Index	21,075.0	1.1	(9.9)	
MSCI-Asia pacific	MXAP Index	159.2	(0.1)	(17.6)	
<u>Global Indices</u>					
Dow Jones	INDU Index	29,927.1	(2.4)	(17.6)	
S&P 500	SPX Index	3,666.8	(3.3)	(23.1)	
Nasdaq	CCMP Index	10,646.1	(4.1)	(32.0)	
FTSE 100	UKX Index	7,092.1	0.7	(4.0)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,823.0	(0.4)	(3.8)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,761.8	0.2	3.5
3 month	IDSWT3M Index	14,740.9	(0.1)	(3.3)
6 month	IDSWT6M Index	14,738.2	(0.1)	(3.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,774.1	0.1	(3.3)
6 month	IDFWT6M Index	14,809.5	0.2	(3.0)
			(0.1)	(5.4)

*price as of 6/17/2022


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