



FOR PROFESSIONAL INVESTORS - 07/27/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### BETTER

JCI slightly strengthened and closed at 6,898 (+27 points or +0.39%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 38Bn today and rupiah slightly weakened to IDR 15,012/USD.

Banking stocks were mixed as BMRI (+1.25%), BBKA (+0.34%), and BBNI (+1.3%) closed higher, while BBRI (-0.23%) and MEGA (-4.17%) closed lower. Consumer names were negative as KLBF (-0.29%), HMSP (-2.04%), ICBP (-1.07%), MYOR (-4.76%), and UNVR (-4.26%) all declined. Mining stocks were mostly positive as ADRO (+3.8%), ITMG (+9.27%), PTBA (+4.4%), and INDY (+3.11%) all advanced, except INCO (-0.88%). Material names were mixed as BRPT (+3.39%) closed higher, while TPIA unchanged. Other movers were AGRO (+10.88%), TOWR (+3%), ENRG (-6.76%), and ESSA (-5%).

Bank Indonesia noted that lending to MSME businesses as of June 2022 grew by 17.6% YoY. This achievement was mainly driven by micro credit which increased significantly by 113.7% YoY.

### BOND MARKET

#### TRADING HIGHER

The bond market traded higher today despite local currency weakened to 15,010 level against USD. Consistent flow was seen towards benchmark and non-benchmark series specially on >10Y areas. Overall market tone was bullish with mixed players. At the end of the day, bonds yield closed 5 to 12 bps lower. The benchmark series of 5, 10, 15 and 20Y closed at mid-yield of 6.7%, 7.34%, 7.11% and 7.44% respectively. In the meantime, market waits for FOMC meeting tonight.

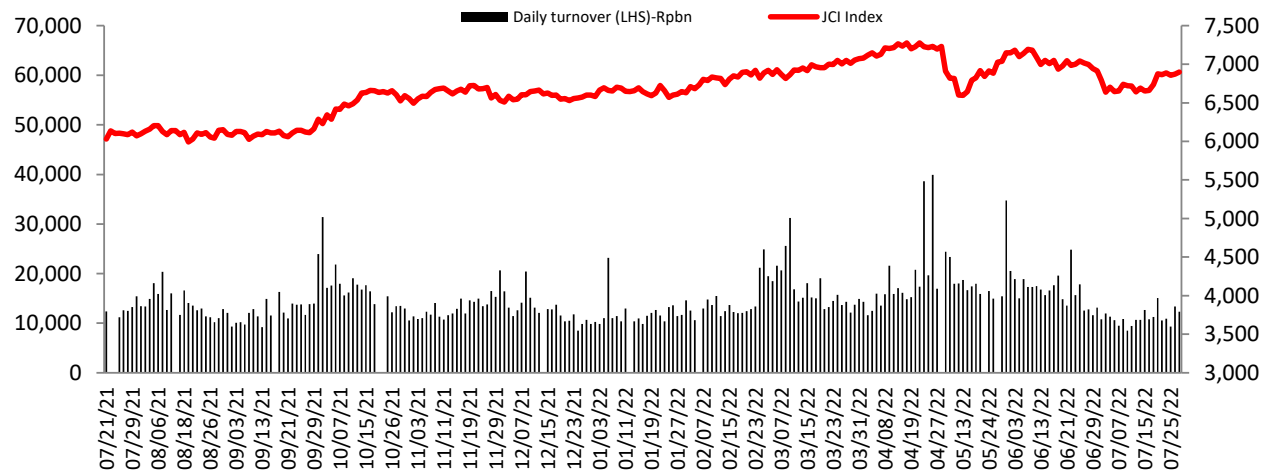


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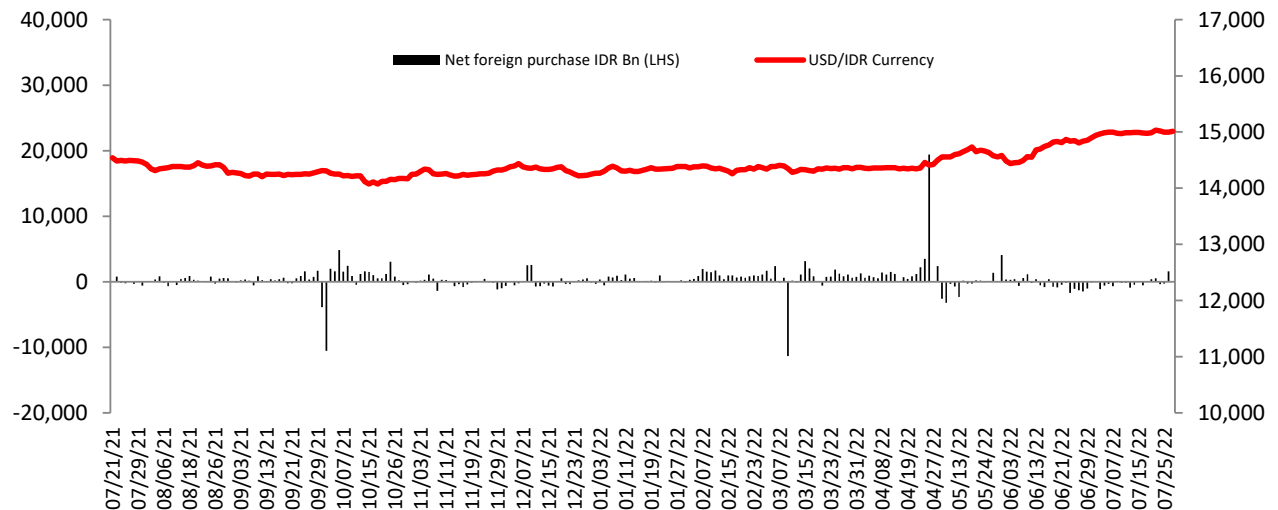
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## GRAPHS & TABLES

### 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	93.7	0.0	(7.2)	5Y
FR82	FR0082 Govt	93.2	0.3	(7.5)	10Y
FR80	FR0080 Govt	92.6	0.5		15Y
FR83	FR0083 Govt	96.2	0.1	(6.3)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,898.2	0.4	4.8	
Thailand	SET Index	1,572.9	1.3	(5.1)	
Korean Stock Exch.	KOSPI Index	2,415.5	0.1	(18.9)	
Straight Times	FSSTI Index	3,202.5	0.3	2.5	
Kuala Lumpur	KLCI Index	1,470.7	0.5	(6.2)	
Philippines	PCOMP Index	6,236.8	0.2	(12.4)	
Nikkei	NKY Index	27,715.8	0.2	(3.7)	
Hang Seng	HSI Index	20,670.0	(1.1)	(11.7)	
MSCI-Asia pacific	MXAP Index	159.1	0.2	(17.6)	
<u>Global Indices</u>					
Dow Jones	INDU Index	31,761.5	(0.7)	(12.6)	
S&P 500	SPX Index	3,921.1	(1.2)	(17.7)	
Nasdaq	CCMP Index	11,562.6	(1.9)	(26.1)	
FTSE 100	UKX Index	7,334.6	0.4	(0.7)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,012.0	(0.1)	(5.1)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,995.0	0.0	5.2
3 month	IDSWT3M Index	14,988.2	(0.1)	(5.0)
6 month	IDSWT6M Index	14,993.8	0.0	(5.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,992.3	9,510.5	(4.8)
6 month	IDFWT6M Index	1,551.9	0.9	89.2
				(6.4)

\*price as of 7/27/2022


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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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