



FOR PROFESSIONAL INVESTORS - 10/14/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

HOLDING UP

JCI advanced and closed at 6,626 (+89 points or +1.36%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 1.6Tn today and rupiah advanced to IDR 14,118/USD.

Banking stocks were mostly positive as BBKA (+2.99%), BBNI (+3%), BMRI (+1.06%), and PNBK (+5.13%) all up, except BBRI (-0.7%). Consumer names were mostly positive as ICBP (+4.19%), MYOR (+5.37%), UNVR (+1.43%), and KLBF (+3.61%) all in green, except HMSP (-1.29%). Cement stocks were positive as SMGR (+7.53%), INTP (+5.26%), SMBR (+9.8%), and SMCB (+2.03%) all inched higher. Retailer names were positive as AMRT (+5.96%), MAPI (+4.14%), MAPA (+3.32%), and ACES (+0.71%) all inched higher. Other movers were BBHI (+15.02%), EMTK (+11.74%), ASSA (-6.88%), and BHIT (-6.76%).

BI expects that the Indonesian economy in the third quarter of 2021 will grow 5% YoY despite the PPKM at the beginning of the third quarter. Economic improvement will continue in the fourth quarter with a projected economic growth of 4.5%, so that this year's overall economic performance is able to grow 3.5% to 4.3%.

BOND MARKET

LOWER YIELD

Indonesia bond market closed the day firmer following 10Y UST yield lower to 1.53% and Rupiah traded below 14,200 level. As soon as market opened, we seen mixed players came to secondary market to collect across the curve. The benchmark series remain as market's favorite. Overall sentiment was bullish until closing time and at the end of the day, bonds yield closed 8 – 10 bps lower across the board. The benchmark series 5Y/10Y/15Y/20Y closed at mid-yield of 5.09%/6.22%/6.31%/7.13% respectively.

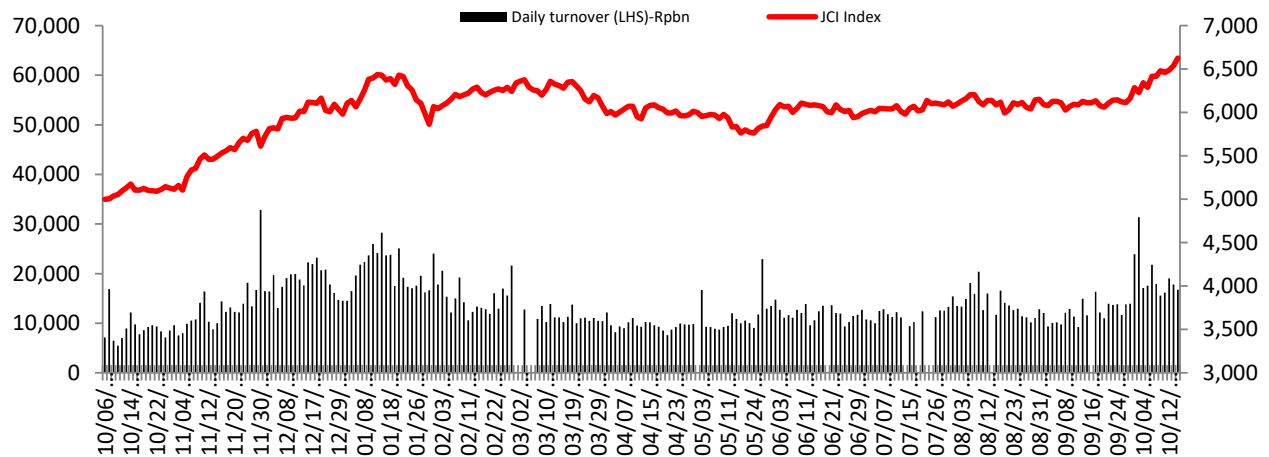


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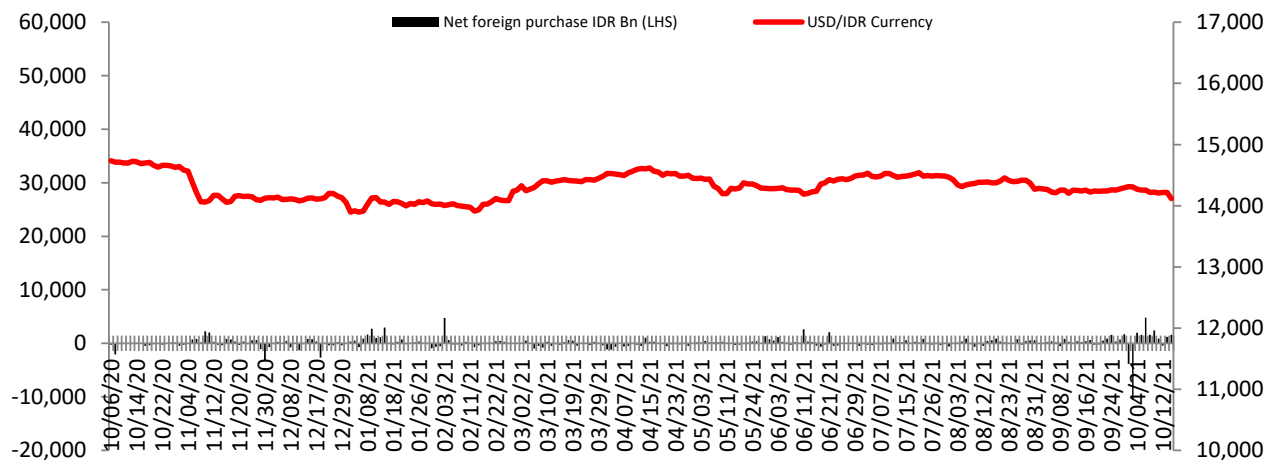
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GRAPHS & TABLES

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	101.6	0.3	(0.1)	5Y
FR82	FR0082 Govt	101.5	0.3	(3.1)	10Y
FR80	FR0080 Govt	99.4	0.2		15Y
FR83	FR0083 Govt	103.7	0.9	(6.4)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,626.1	1.4	10.8	
Thailand	SET Index	1,641.0	(0.2)	13.2	
Korean Stock Exch.	KOSPI Index	2,988.6	1.5	4.0	
Straight Times	FSSTI Index	3,164.9	0.3	11.3	
Kuala Lumpur	KLCI Index	1,592.5	(0.5)	(2.1)	
Philippines	PCOMP Index	7,183.1	1.6	0.6	
Nikkei	NKY Index	28,550.9	1.5	4.0	
Hang Seng	HSI Index	24,962.6	(1.4)	(8.3)	
MSCI-Asia pacific	MXAP Index	194.8	0.3	(2.5)	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,783.6	1.2	13.6	
S&P 500	SPX Index	4,363.8	0.3	16.2	
Nasdaq	CCMP Index	14,703.6	0.9	14.1	
FTSE 100	UKX Index	7,204.4	0.9	11.5	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,118.0	0.7	(0.5)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,222.0	0.0	0.9
3 month	IDSWT3M Index	14,220.7	0.1	(0.9)
6 month	IDSWT6M Index	14,220.0	0.0	(0.9)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,251.8	(0.3)	(0.7)
6 month	IDFWT6M Index	14,350.0	0.0	0.5

*price as of 10/13/2021


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