



FOR PROFESSIONAL INVESTORS - 07/01/2020

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

SLIGHTLY UP

JCI slightly strengthened and closed at 4,914 (+9 points or +0.18%) today. Shares across regional markets edged higher as investors mulled mixed economic data and fresh warnings about the spread of coronavirus. Meanwhile, foreign investors recorded net outflow on 16th day of IDR 378Bn today and rupiah slightly weakened to IDR 14,283/USD.

Banking stocks were mixed as BBKA (+1.84%), BBRI (+0.99%), and BMRI (+0.81%) in green, while PNBK (-2.45%) and BBNI (-0.87%) weakened. Consumer names were mostly negative as GGRM (-0.37%), ICBP (-1.6%), HMSP (-1.22%), and UNVR (-1.27%) all retreated, except SDO (+3.29%). Pulp & paper stocks were positive as TKIM (+15.05%) and INKP (+5.44%) all closed higher. Mining names were mostly positive as ADRO (+5.03%), PTBA (+3.47%), ITMG (+2.11%), and INDY (+0.75%) all in green, except ANTM (-0.83%). Other movers were NATO (+25%), PLIN (+21.46%), TCPI (-6.88%), and DNET (-5.71%).

The new health security premium is effective per today (1st Jul 2020), with premium close to double. From Dec 19 - May 20, there have been 2.3 mn or 7.5% of total independent participants moved to lower class with lower premium.

BOND MARKET

WITHIN RANGE

Indonesia bond market opened the day unchanged despite local currency weakened against USD. In the morning session, we heard 5Y and 10Y benchmark series was traded as low as 6.57% and 7.24%. We have seen few investors had taken the opportunity to collecting at the bottom in the afternoon session. Overall, IDR bonds yield went up 1-3bps compared to yesterday closing. The benchmark series of 5, 10, 15 and 20Y closed the week at mid yield of 6.51%, 7.19%, 7.6% and 7.65%.

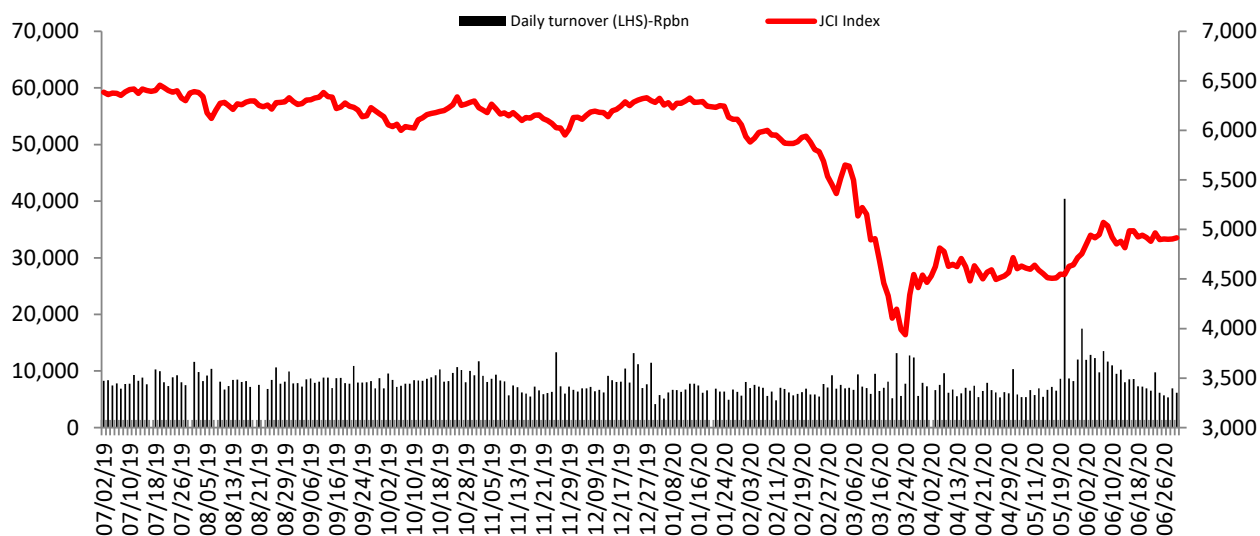


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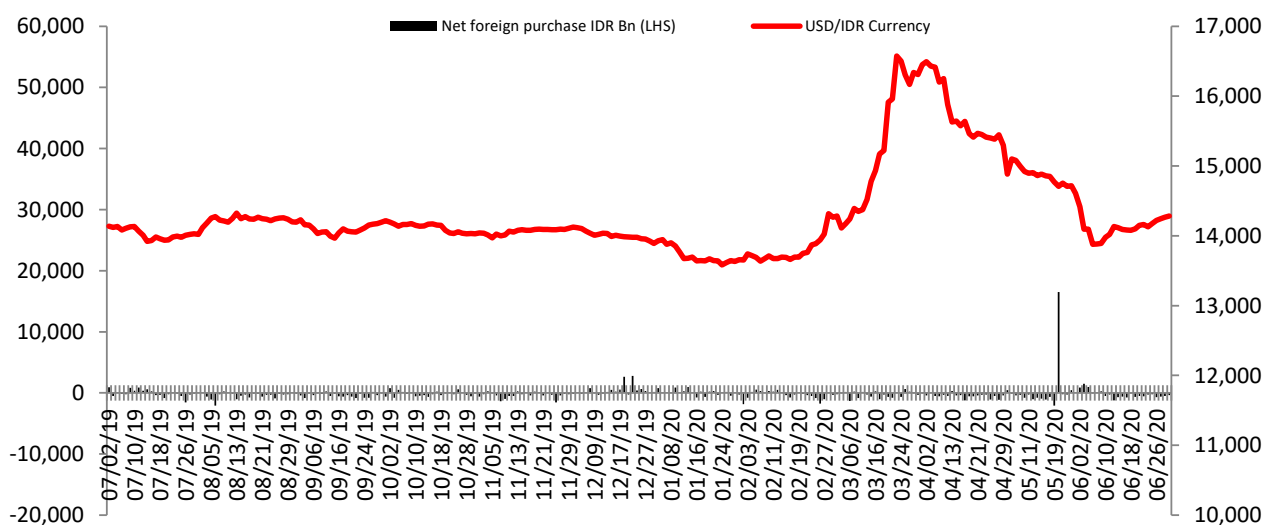
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GRAPHS & TABLES

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	99.9	(0.1)	(0.7)	5Y
FR82	FR0082 Govt	98.5	(0.2)	(1.1)	10Y
FR80	FR0080 Govt	99.1	(0.0)	(1.2)	15Y
FR83	FR0083 Govt	98.6	(0.1)	(0.9)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	4,914.4	0.2	(22.0)	
Thailand	SET Index	1,349.4	0.8	(14.6)	
Korean Stock Exch.	KOSPI Index	2,106.7	(0.1)	(4.1)	
Straight Times	FSSTI Index	2,610.2	0.8	(19.0)	
Kuala Lumpur	KLCI Index	1,514.4	0.9	(4.7)	
Philippines	PCOMP Index	6,209.7	0.0	(20.5)	
Nikkei	NKY Index	22,121.7	(0.7)	(6.5)	
Hang Seng	HSI Index	24,427.2	0.5	(13.3)	
MSCI-Asia pacific	MXAP Index	157.9	0.6	(7.5)	
<u>Global Indices</u>					
Dow Jones	INDU Index	25,812.9	0.8	(9.6)	
S&P 500	SPX Index	3,100.3	1.5	(4.0)	
Nasdaq	CCMP Index	10,058.8	1.9	12.1	
FTSE 100	UKX Index	6,153.1	(0.3)	(18.4)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,283.0	(0.1)	(2.9)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,370.9	(0.4)	2.8
3 month	IDSWT3M Index	14,497.8	0.4	(4.6)
6 month	IDSWT6M Index	14,406.7	(0.1)	(3.9)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,502.5	0.8	(4.0)
6 month	IDFWT6M Index	14,631.0	0.2	(3.1)

*price as of 6/30/2020


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