

FOR PROFESSIONAL INVESTORS - 09/01/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

WEAKENED

JCI weakened and closed at 6,091 (-59 points or -0.97%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 41Bn today and rupiah slightly weakened to IDR 14,283/USD.

Banking stocks were mixed as BDMN (+9.79%) and BBCA (+0.23%) inched higher, while BBNI (-1.39%), BMRI (-1.64%), and BBRI (-1.02%) declined. Consumer names were positive as UNVR (+1.23%), INDF (+2.83%), MYOR (+2.33%), KLBK (+1.49%), and GGRM (+0.83%) all up. Telco stocks were negative as ISAT (-1.19%), FREN (-5.97%), and TLKM (-1.76%) all declined. Material names were negative as TPIA (-2.23%) and BRPT (-4.23%) all down. Other movers were ADRO (+4.76%), BBYB (+3.95%), POLL (-6.86%), and ARTO (-4.45%).

Staple goods which are consumed by general public will be exempted from VAT. Medical services which is not covered by BPJS will also be exempted.

BOND MARKET

A TAD HIGHER

Supportive sentiment post yesterday massive auction left no trace today as the bond market closed the day softer despite a promising opening level. Several profit takers came to secondary market and concentrated on market's favorite, 5Y and 10Y areas followed higher 10Y UST yield. Overall, yield higher by about 3 – 6 bps compared to yesterday closing. In the middle of the day, Inflation data that came out as expected (MoM 0.03%, YoY 1.59%, Core yoy 1.31%) and no reaction from market.

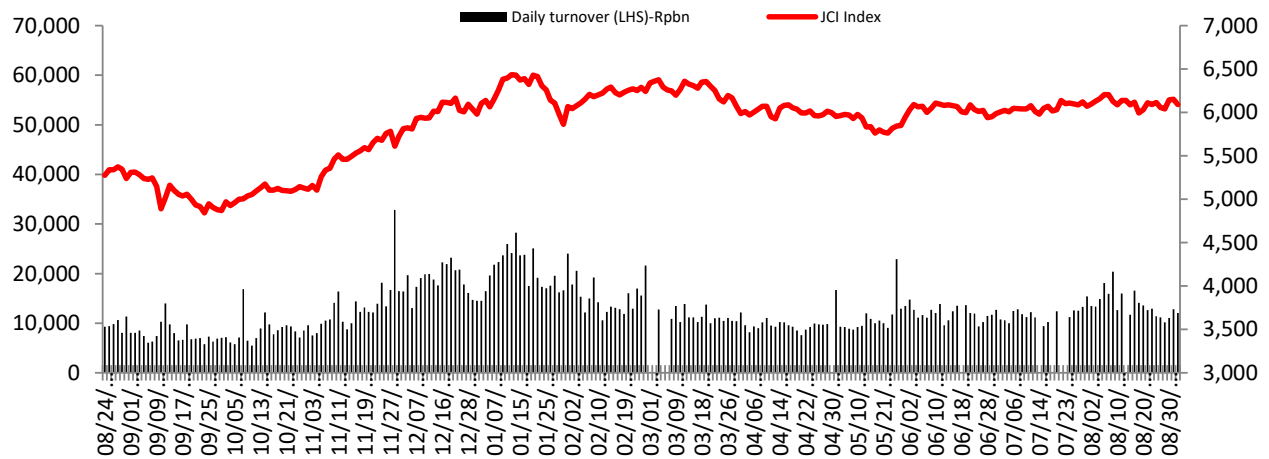


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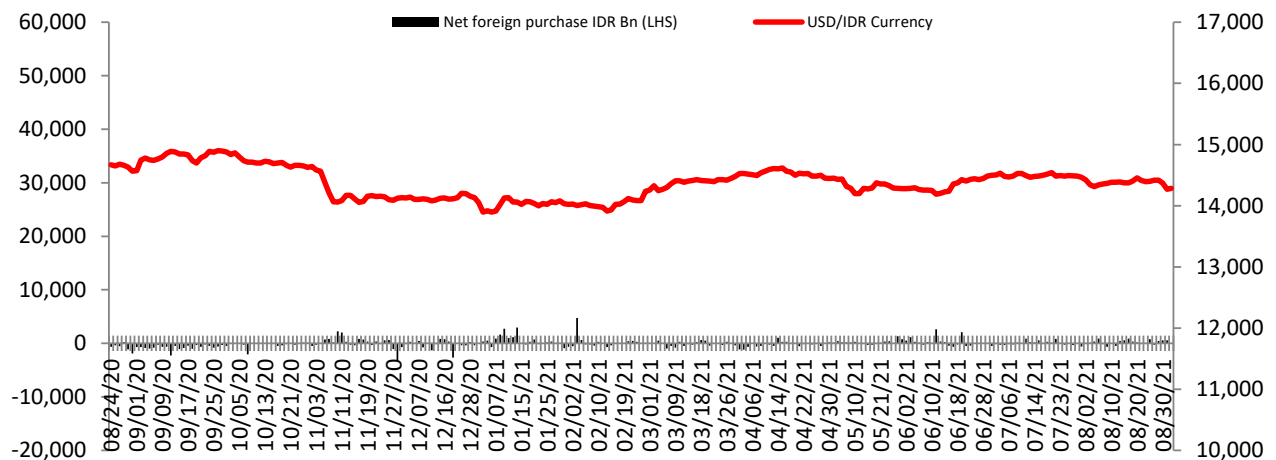
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GRAPHS & TABLES

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	101.9	(0.0)	0.2	5Y
FR82	FR0082 Govt	103.1	(0.2)	(1.6)	10Y
FR80	FR0080 Govt	99.7	(0.0)		15Y
FR83	FR0083 Govt	107.2	0.6	(3.2)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,090.9	(1.0)	1.9	
Thailand	SET Index	1,634.5	(0.3)	12.8	
Korean Stock Exch.	KOSPI Index	3,207.0	0.2	11.6	
Straight Times	FSSTI Index	3,087.8	1.1	8.6	
Kuala Lumpur	KLCI Index	1,586.9	(0.9)	(2.5)	
Philippines	PCOMP Index	6,785.9	(1.0)	(5.0)	
Nikkei	NKY Index	28,451.0	1.3	3.7	
Hang Seng	HSI Index	26,028.3	0.6	(4.4)	
MSCI-Asia pacific	MXAP Index	201.8	1.3	0.9	
<u>Global Indices</u>					
Dow Jones	INDU Index	35,360.7	(0.1)	15.5	
S&P 500	SPX Index	4,522.7	(0.1)	20.4	
Nasdaq	CCMP Index	15,259.2	(0.0)	18.4	
FTSE 100	UKX Index	7,178.2	0.8	11.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,283.0	(0.1)	(1.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,284.4	(0.6)	1.4
3 month	IDSWT3M Index	14,305.6	(0.5)	(1.5)
6 month	IDSWT6M Index	14,314.8	(0.4)	(1.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,348.7	(0.5)	(1.3)
6 month	IDFWT6M Index	14,426.5	(0.4)	(0.1)

*price as of 8/31/2021


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