

FOR PROFESSIONAL INVESTORS - 10/09/2020

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### SUSTAIN ABOVE 5,000

JCI slightly strengthened and closed at 5,054 (+15 points or +0.29%) today despite of the demonstrations against the passing of Omnibus Law ended with some violence in several cities including Jakarta yesterday. Shares across regional markets were mixed following the reopening of China's equity markets after golden week holidays. Meanwhile, foreign investors recorded net outflow of IDR 90Bn today and rupiah was stabilized at IDR 14,700/USD.

Banking stocks were mixed as BNLN (+25%), BMRI (+1.83%), and BDMN (+1.79%) up, while BBNI (-0.64%) and BBCA (-0.09%) down. Consumer names were mixed as UNVR (+0.31%) and GGRM (+0.85%) advanced, while MYOR (-0.82%), HMSP (-0.32%), and KLBF (-1.88%) closed lower. Construction stocks were positive as WSKT (+7.34%), WIKA (+4.74%), PTPP (+3.47%), and ADHI (+2.78%) all rose. Mining names were positive as INCO (+5.43%), ANTM (+6.25%), and TINS (+3.52%) all in green. Other movers were PPRE (+34.72%), TCPI (+1.83%), SMGR (-2.85%), and DNET (-2.73%).

Minister of Manpower, Ida Fauziyah, noted the government regulation on manpower is targeted to be completed in end of Oct. There will be 3 - 5 government regulations to accompany the omnibus law on manpower.

### BOND MARKET

#### QUIET

It was a quiet trading for bond market today with small trades on benchmark series. Investors were comfortable stay sidelined lacking of any news to move the market. Overall prices moved within range, with yield curve closed flat with benchmark series of 5Y/10Y/15Y/20Y closed at 5.74%/6.88%/7.39%/7.41% respectively. Next week on October 13th, MoF will hold regular Sukuk auction of 6M SPNS, 3Y PBS-027, 4Y PBS-026, 13Y PBS-025 and 26Y PBS-028 with indicative target of IDR 10Tn.

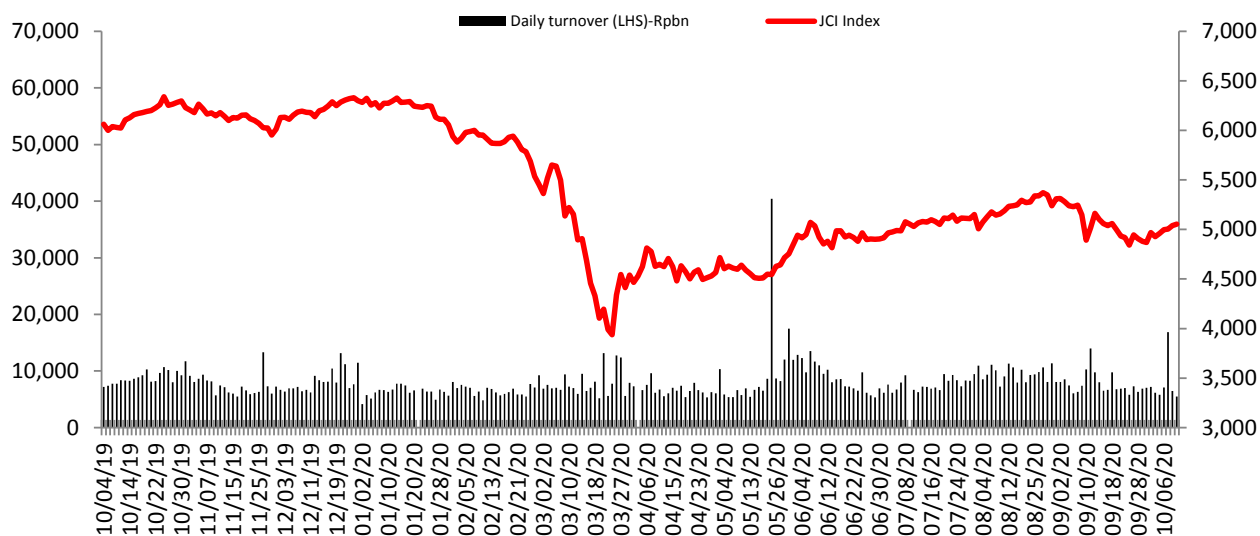


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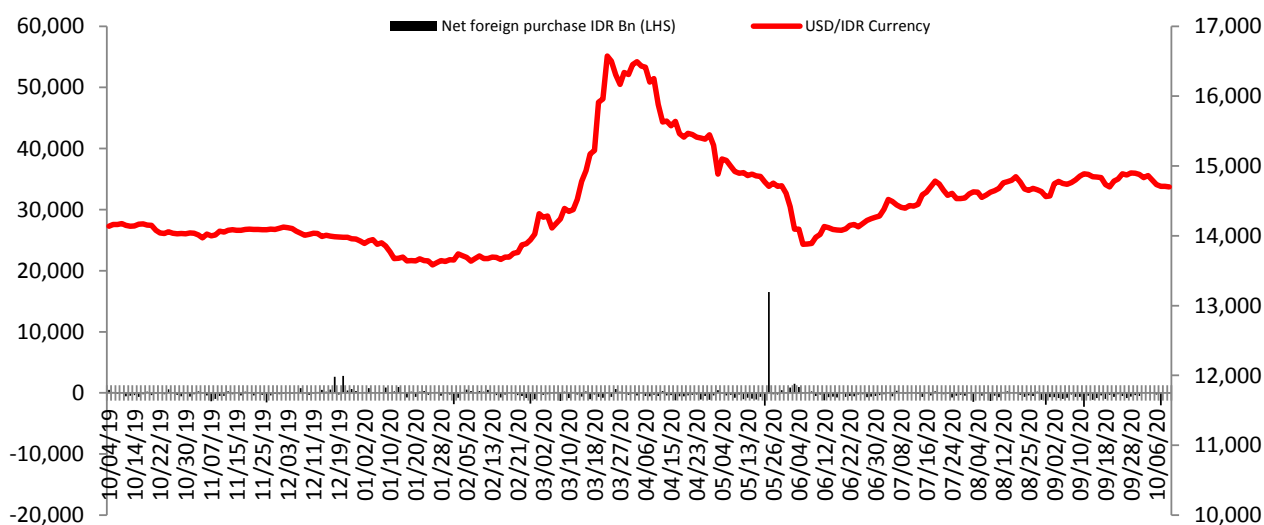
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## GRAPHS & TABLES

### 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	103.0	0.0	2.5	5Y
FR82	FR0082 Govt	100.9	0.0	1.3	10Y
FR80	FR0080 Govt	100.9	0.0	0.5	15Y
FR83	FR0083 Govt	101.0	0.0	1.4	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	5,053.7	0.3	(19.8)	
Thailand	SET Index	1,267.1	(0.6)	(19.8)	
Korean Stock Exch.	KOSPI Index	2,392.0	0.2	8.8	
Straight Times	FSSTI Index	2,533.0	(0.4)	(21.4)	
Kuala Lumpur	KLCI Index	1,530.4	0.7	(3.7)	
Philippines	PCOMP Index	5,931.6	(0.2)	(24.1)	
Nikkei	NKY Index	23,619.7	(0.1)	(0.2)	
Hang Seng	HSI Index	24,119.1	(0.3)	(14.4)	
MSCI-Asia pacific	MXAP Index	175.0	0.7	2.6	
<u>Global Indices</u>					
Dow Jones	INDU Index	28,425.5	0.4	(0.4)	
S&P 500	SPX Index	3,446.8	0.8	6.7	
Nasdaq	CCMP Index	11,421.0	0.5	27.3	
FTSE 100	UKX Index	6,009.4	0.5	(20.3)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,700.0	0.1	(5.7)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,768.0	(0.6)	5.6
3 month	IDSWT3M Index	14,746.6	(0.0)	(6.4)
6 month	IDSWT6M Index	14,745.0	(0.2)	(6.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,794.7	0.3	(6.1)
6 month	IDFWT6M Index	14,965.0	0.6	(5.5)

\*price as of 10/8/2020



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