

FOR PROFESSIONAL INVESTORS - 03/30/2023

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Risk On

JCI advanced and closed at 6,839 (+79 points or +1.17%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 1.1Tn today and rupiah slightly strengthened to IDR 15,065/USD.

Banking stocks were positive as BBKA (+3.47%), BMRI (+2.22%), BBRI (+0.84%), BBNI (+1.94%), and BBTN (+1.89%) all advanced. Consumer names were mostly positive as KLBF (+2.33%), UNVR (+1.4%), GGRM (+3.32%), and MYOR (+2.62%) all inched higher, except ICBP (-1.24%). Mining stocks were positive as ADRO (+3.97%), ANTM (+4.26%), ITMG (+2.71%), PTBA (+2.62%), and INDY (+7.56%) all inched higher. Infra names were positive as TOWR (+2.15%), TBIG (+1.84%), PGAS (+1.44%), and JSMR (+2.22%) all advanced. Other movers were ARTO (+8.97%), AKRA (+4.87%), MLIA (-5.5%), and BUMI (-2.92%).

The number of income tax returns (SPT) reporting tends to slow down, as of March 27 it only grew 4.43% to reach 9.8mn.

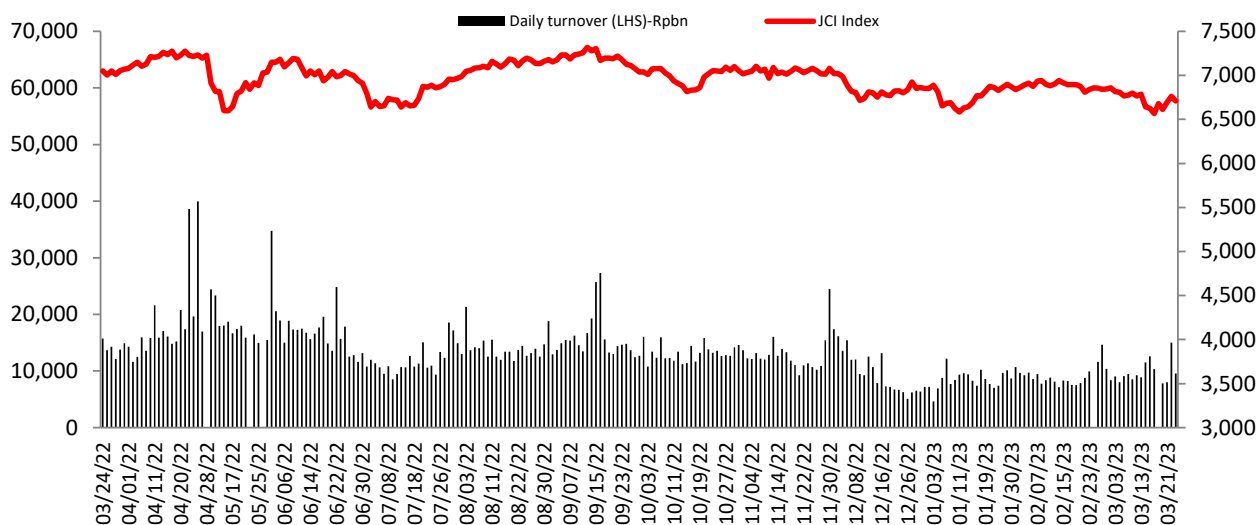
BOND MARKET

TWO WAYS TRADING

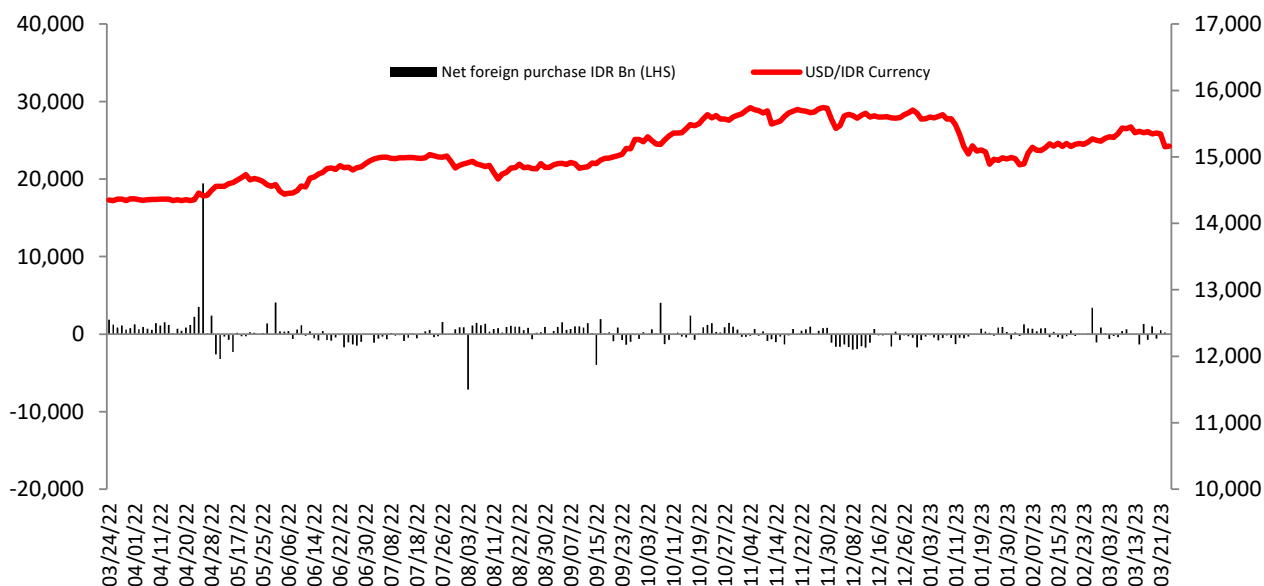
Indonesia bond market closed the day with higher yield around 2 – 5 bps post yesterday auction. In the morning session, we witnessed two ways trading in the market. Mixed trading was seen with local names and auction winners were on the sell side while offshore names and unabsorbed bidder on the buy side. On the other hand, MoF will conduct the first debt switch auction of this year, targeting <4Y non benchmark series with the current benchmark series.

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	95.9	(0.1)	(0.3)	5Y
FR82	FR0082 Govt	98.1	(0.1)	1.8	10Y
FR80	FR0080 Govt	96.9	(0.2)	0.5	15Y
FR83	FR0083 Govt	101.4	0.0	1.1	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,839.4	1.2	(0.2)	
Thailand	SET Index	1,608.9	0.1	(3.6)	
Korean Stock Exch.	KOSPI Index	2,443.9	0.4	9.3	
Straight Times	FSSTI Index	3,262.5	0.2	0.3	
Kuala Lumpur	KLCI Index	1,420.4	0.8	(5.0)	
Philippines	PCOMP Index	6,631.0	0.4	1.0	
Nikkei	NKY Index	27,883.8	1.3	6.9	
Hang Seng	HSI Index	20,192.4	2.1	2.1	
MSCI-Asia pacific	MXAP Index	159.8	0.8	2.6	
<u>Global Indices</u>					
Dow Jones	INDU Index	32,394.3	(0.1)	(2.3)	
S&P 500	SPX Index	3,971.3	(0.2)	3.4	
Nasdaq	CCMP Index	11,716.1	(0.4)	11.9	
FTSE 100	UKX Index	7,534.8	0.7	1.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,065.0	0.1	3.3
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,089.0	(0.6)	(4.0)
3 month	IDSWT3M Index	15,089.8	(0.6)	3.1
6 month	IDSWT6M Index	15,083.1	(0.6)	3.2
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,094.7	(0.7)	3.1
6 month	IDFWT6M Index	15,115.0	(0.7)	3.4

*price as of 3/28/2023


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