



FOR PROFESSIONAL INVESTORS - 06/27/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### SOLD OFF

JCI slightly weakened and closed at 7,016 (-27 points or -0.38%) today. Shares across regional markets were positive. Meanwhile, foreign investors recorded net outflow of IDR -1.3Tn today and rupiah slightly strengthened to IDR 14,803/USD.

Banking stocks were mostly negative as BBNI (-1.23%), BMRI (-0.9%), BBRI (-1.38%), and BBCA (-1.67%) all down, except PNB (+11.39%). Consumer names were mixed as INDF (+1.77%), ICBP (+0.8%), and MYOR (+0.99%) in green, while UNVR (-0.2%) and KLBF (-0.88%) weakened. Mining stocks were negative as ADRO (-0.34%), ITMG (-1.48%), PTBA (-2.93%), ANTM (-4.06%), and INCO (-6.35%) all retreated. Poultry names were positive as CPIN (+2.61%), JPFA (+1.29%), and MAIN (+0.78%) all closed higher. Other movers were SMDR (+10.65%), PNLF (+8.91%), BIPI (-6.9%), and MDKA (-6.53%).

The fintech peer to peer (p2p) lending industry recorded outstanding loans of Rp40.2tn as of May 2022, an increase of 85% YoY. Meanwhile, fintech lending also continues to expand access to loans to Eastern Indonesia.

### BOND MARKET

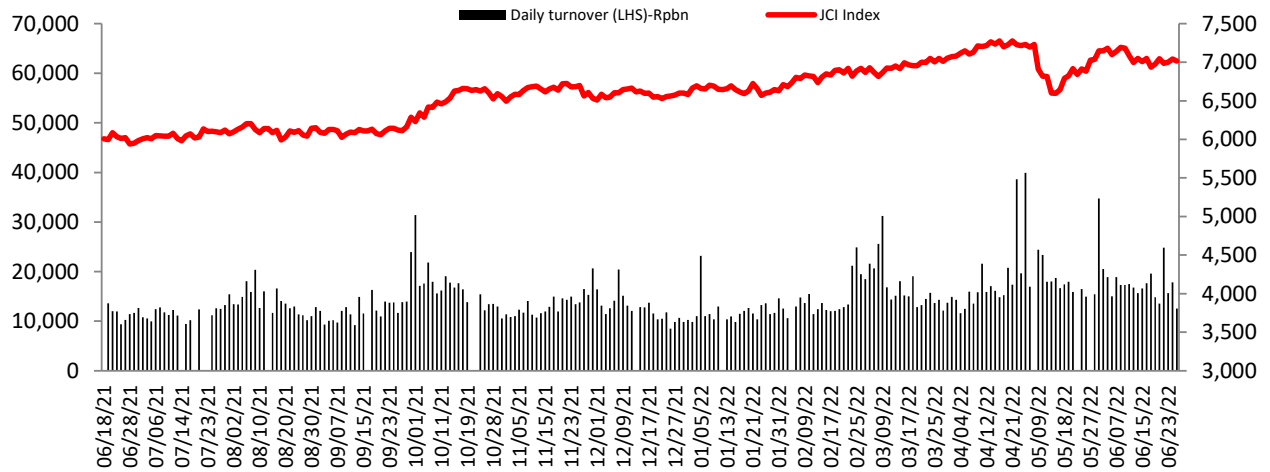
#### UNEVENTFUL

Nothing much changed despite local currency strengthened against USD. Trading activity mainly done by onshore names today with activity continued to be clustered in front ends. Market activity throughout the day was limited. Yield curve moved lower around 1 – 3 bps compared to last Friday. The 5Y/10Y/15Y/20Y benchmark closed at mid-yield of 6.49%/7.25%/7.29%/7.23%.

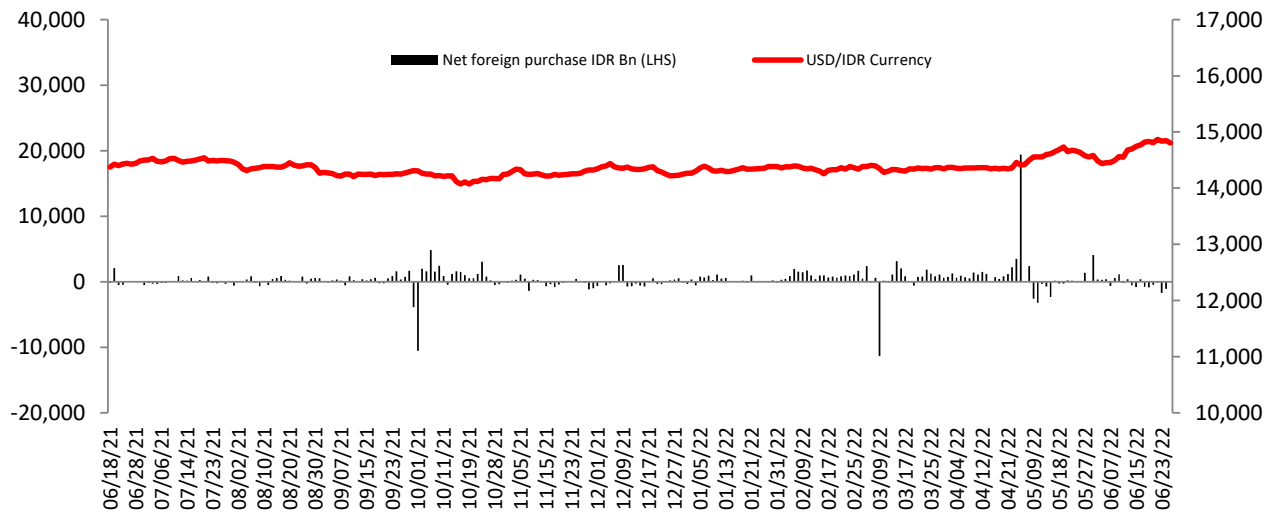
Tomorrow on June 28th Indonesia Debt Management Office (“DMO”) will hold sukuk bond auction with target of IDR 9Tn. The series that will be issued are 6mo SPN-S, 2Y PBS31, 4Y PBS32, 6Y PBS30, 12Y PBS29 and 25Y PBS33.

## 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	94.8	0.2	(6.1)	5Y
FR82	FR0082 Govt	93.9	0.4	(6.8)	10Y
FR80	FR0080 Govt	91.8	0.1		15Y
FR83	FR0083 Govt	98.7	0.2	(3.8)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,016.1	(0.4)	6.6	
Thailand	SET Index	1,580.2	0.7	(4.7)	
Korean Stock Exch.	KOSPI Index	2,401.9	1.5	(19.3)	
Straight Times	FSSTI Index	3,137.5	0.8	0.4	
Kuala Lumpur	KLCI Index	1,438.1	0.1	(8.3)	
Philippines	PCOMP Index	6,238.8	0.3	(12.4)	
Nikkei	NKY Index	26,871.3	1.4	(6.7)	
Hang Seng	HSI Index	22,229.5	2.4	(5.0)	
MSCI-Asia pacific	MXAP Index	159.2	1.2	(17.6)	
<u>Global Indices</u>					
Dow Jones	INDU Index	31,500.7	2.7	(13.3)	
S&P 500	SPX Index	3,911.7	3.1	(17.9)	
Nasdaq	CCMP Index	11,607.6	3.3	(25.8)	
FTSE 100	UKX Index	7,256.6	0.7	(1.7)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,803.0	0.3	(3.7)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,850.0	0.1	4.1
3 month	IDSWT3M Index	14,850.0	(0.1)	(4.0)
6 month	IDSWT6M Index	14,836.0	(0.2)	(4.0)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,865.0	0.1	(3.9)
6 month	IDFWT6M Index	14,890.0	(0.1)	(3.5)
				(5.6)

\*price as of 6/25/2022

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