



FOR PROFESSIONAL INVESTORS - 12/23/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### SLIDE DOWN

JCI slightly weakened and closed at 6,801 (-24 points or -0.35%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net outflow of IDR 775Bn today and rupiah was stabilized at IDR 15,593/USD.

Banking stocks were negative as MEGA (-0.45%), BMRI (-0.25%), BBNI (-1.06%), BBCA (-0.87%), and BBRI (-1.61%) all declined. Consumer names were negative as UNVR (-0.41%), SIDO (-2.6%), MYOR (-1.6%), ICBP (-0.99%), and KLBF (-0.97%) all weakened. Mining stocks were negative as PTBA (-0.53%), INDY (-2.42%), ANTM (-1.48%), INCO (-2.42%), and ADRO (-3.05%) all corrected. Material names were positive as BRPT (+2.63%) and TPIA (+0.81%) all closed higher. Other movers were MKPI (+13.52%), LPKR (+5%), STTP (-5.67%), and EMTK (-1.92%).

Bank Indonesia recorded loan growth reaching 11.16% YoY in Nov-22, slowing down from Oct-22 at 11.95% YoY. MSME loan growth in Nov-22 reached 18.13% YoY, slightly higher than Oct-22 at 17.50% YoY. Meanwhile, gross NPL in Oct-22 stood at 2.72%, down from Sep-22 at 2.78%.

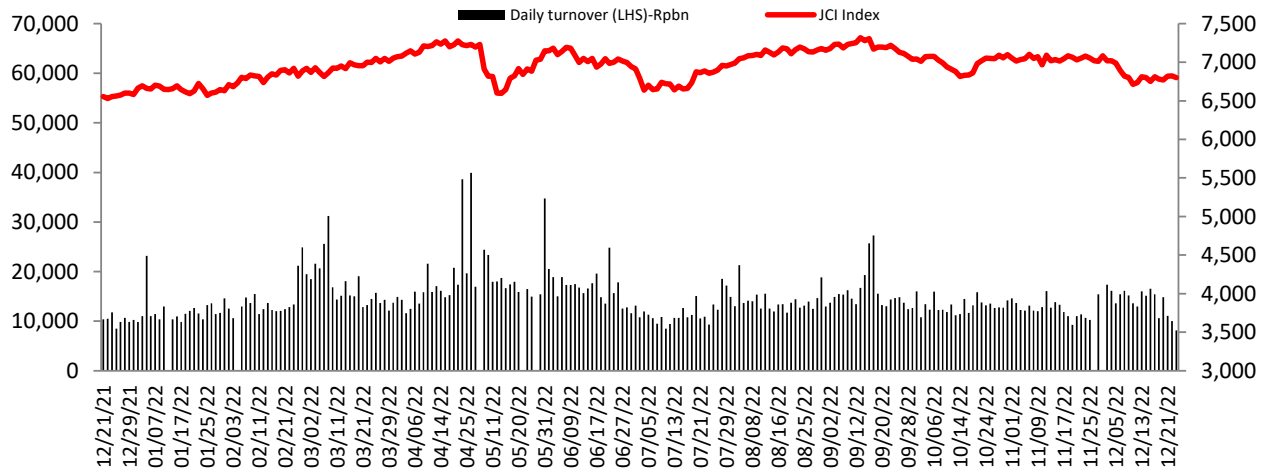
### BOND MARKET

#### ONE (TRADING) DAY BEFORE CHRISTMAS

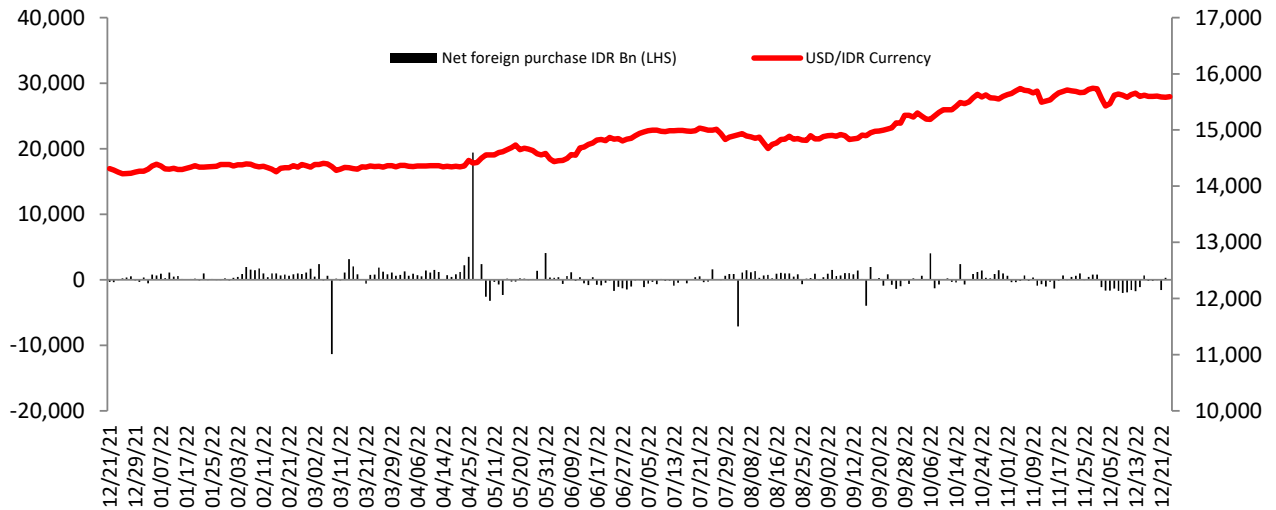
As expected the bond market was very quiet as holiday mood kicks in. Trading activity was very limited as most players preferred not to add risk towards year-end. Nonetheless, we heard buying interest in 15Y FR98 and 2Y FR70 which yield fell by -4bps and -11bps respectively. The rest of the curve were rather flattish. The 5/10/15Y closed the day at 6.53%/6.92%/7.02% respectively.

# 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	96.2	0.0	(4.7)	5Y
FR82	FR0082 Govt	96.5	(0.0)	(4.3)	10Y
FR80	FR0080 Govt	96.3	#VALUE!		15Y
FR83	FR0083 Govt	100.2	(0.0)	(2.4)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,800.7	(0.3)	3.3	
Thailand	SET Index	1,618.1	0.1	(2.4)	
Korean Stock Exch.	KOSPI Index	2,313.7	(1.8)	(22.3)	
Straight Times	FSSTI Index	3,257.7	(0.4)	4.3	
Kuala Lumpur	KLCI Index	1,474.7	0.4	(5.9)	
Philippines	PCOMP Index	6,541.0	(0.5)	(8.2)	
Nikkei	NKY Index	26,235.3	(1.0)	(8.9)	
Hang Seng	HSI Index	19,593.1	(0.4)	(16.3)	
MSCI-Asia pacific	MXAP Index	157.0	1.0	(18.7)	
<u>Global Indices</u>					
Dow Jones	INDU Index	33,027.5	(1.0)	(9.1)	
S&P 500	SPX Index	3,822.4	(1.4)	(19.8)	
Nasdaq	CCMP Index	10,476.1	(2.2)	(33.0)	
FTSE 100	UKX Index	7,476.6	0.1	1.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,593.0	(0.1)	(8.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,599.0	(0.0)	9.4
3 month	IDSWT3M Index	15,595.9	(0.0)	(9.3)
6 month	IDSWT6M Index	15,598.5	(0.2)	(9.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,591.3	(0.1)	(9.0)
6 month	IDFWT6M Index	15,654.7	(0.5)	(8.8)
				(5.6)

\*price as of 12/23/2022

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