



FOR PROFESSIONAL INVESTORS - 01/10/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### SLIDE LOWER

JCI slightly weakened and closed at 6,691 (-10 points or -0.15%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 249Bn today and rupiah slightly strengthened to IDR 14,308/USD.

Banking stocks were mostly negative as BBTN (-0.58%), BBNI (-0.35%), BBRI (-0.24%), and BBKA (-0.65%) all corrected, except MEGA (+1.45%). Consumer names were positive as KLBF (+2.42%), UNVR (+0.71%), KAEF (+6.15%), MYOR (+1.38%), and SIDO (+2.11%) all inched higher. Infra stocks were negative as JSMR (-0.51%), TBIG (-0.35%), TOWR (-0.93%), and PGAS (-3.32%) all weakened. Telco names were negative as EXCL (-0.66%), ISAT (-1.59%), and TLKM (-1.68%) all closed lower. Other movers were CMPP (+23.39%), BBHI (+19.76%), GEMS (-6.98%), and MASA (-6.93%).

Gaikindo projects new car sales of 900k units in 2022, growing by 4.2% YoY from last year's realization of 863.3k units. This is higher compared to target of 750k units in 2021.

### BOND MARKET

#### STARTED THE WEAK WEAKER

Indonesia bond market closed softer today as price quotation continued its downward movement on the back of higher UST yields. Several selling activities were seen especially on belly part of the curve. The 10Y FR91 traded as low as 99.4 (6.45%) before we saw few bottom fishers came into the market. Bond market then remained quiet in the afternoon session. Overall, yield higher around 3 – 5 bps.

Tomorrow on January 11th MoF will hold the first regular Sukuk auction of the year. The series offered are 6M SPNS, 2Y PBS-031, 4Y PBS-032, 12Y PBS-029, 17Y PBS-034 and 25Y PBS-033 with indicative target of IDR 11Tn.

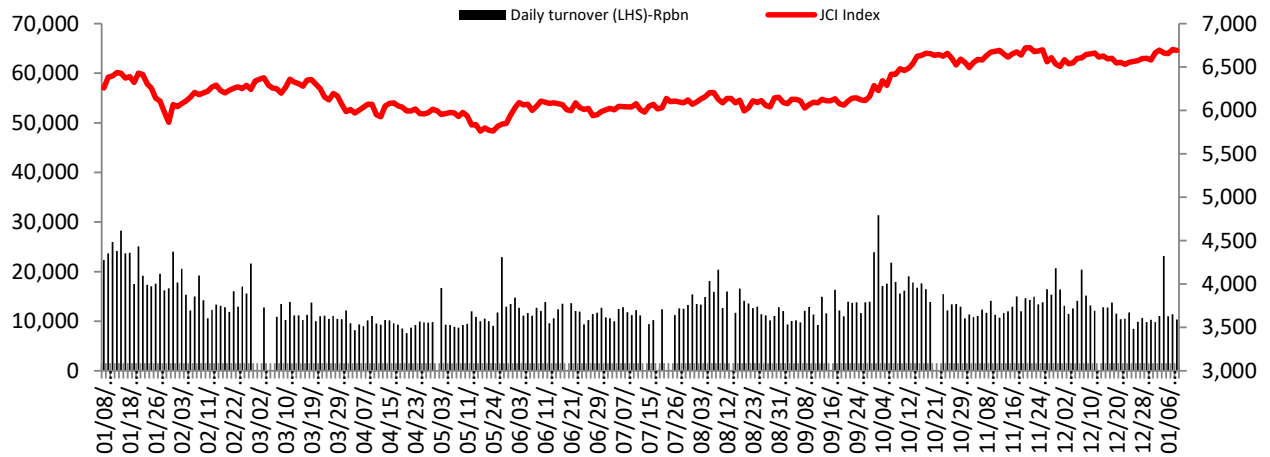


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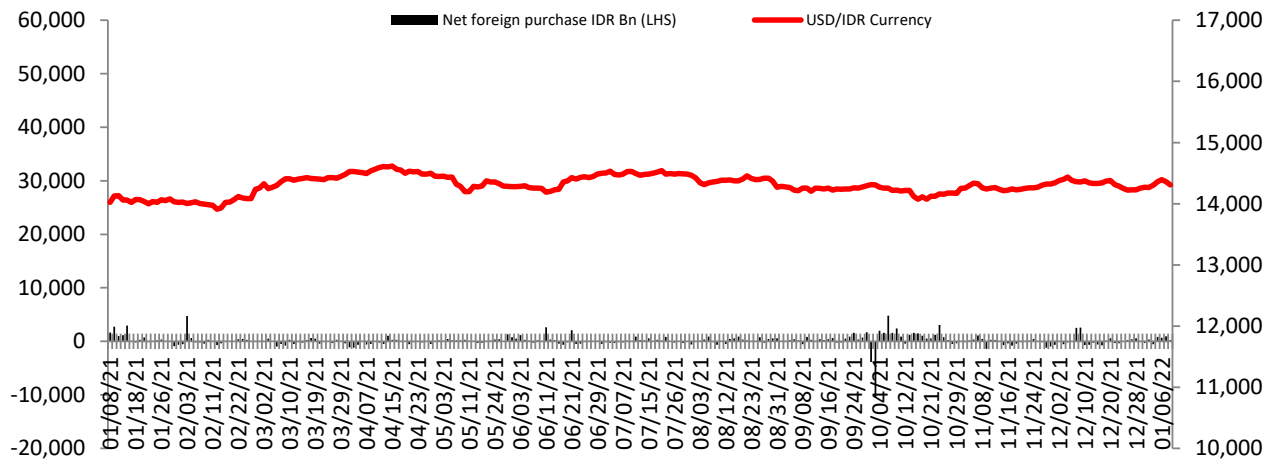
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## GRAPHS & TABLES

### 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	100.9	(0.0)	(0.7)	5Y
FR82	FR0082 Govt	99.7	(0.1)	(1.3)	10Y
FR80	FR0080 Govt	99.7	(0.1)	(0.4)	15Y
FR83	FR0083 Govt	104.2	0.2	(0.3)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,691.1	(0.2)	1.7	
Thailand	SET Index	1,657.1	(0.0)	(0.0)	
Korean Stock Exch.	KOSPI Index	2,926.7	(1.0)	(1.7)	
Straight Times	FSSTI Index	3,227.1	0.7	3.3	
Kuala Lumpur	KLCI Index	1,550.2	0.5	(1.1)	
Philippines	PCOMP Index	7,140.7	1.8	0.3	
Nikkei	NKY Index	28,478.6	(0.0)	(1.1)	
Hang Seng	HSI Index	23,746.5	1.1	1.5	
MSCI-Asia pacific	MXAP Index	192.2	0.6	(0.5)	
<u>Global Indices</u>					
Dow Jones	INDU Index	36,231.7	(0.0)	(0.3)	
S&P 500	SPX Index	4,677.0	(0.4)	(1.9)	
Nasdaq	CCMP Index	14,935.9	(1.0)	(4.5)	
FTSE 100	UKX Index	7,473.2	(0.2)	1.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,308.0	0.3	(0.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,260.0	0.2	0.0
3 month	IDSWT3M Index	14,274.3	0.1	0.0
6 month	IDSWT6M Index	14,267.9	0.0	0.0
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,306.1	(0.3)	0.0
6 month	IDFWT6M Index	14,385.0	0.2	0.0
			(0.1)	(0.2)

\*price as of 1/7/2022

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