

FOR PROFESSIONAL INVESTORS - 08/15/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Dipped

JCI weakened and closed at 7,093 (-36 points or -0.5%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 209Bn today and rupiah weakened to IDR 14,743/USD.

Banking stocks were mostly negative as MEGA (-1.47%), PNB (-7%), BMRI (-0.29%), and BBRI (-0.46%) all retreated, except BBKA (+0.32%). Mining names were negative as INDY (-1.73%), ITMG (-1.19%), ADRO (-0.94%), INCO (-5%), and ANTM (-4.05%) all retreated. Consumer stocks were mostly negative as MYOR (-0.53%), UNVR (-0.21%), GGRM (-0.78%), and KLB (-1.24%) all retreated, except ICBP (+2.31%). Properties names were positive as LPKR (+7.62%), CTRA (+3.09%), PWON (+1.63%), and SMRA (+1.52%) all advanced. Other movers were FREN (+8.57%), PTPP (+4.06%), BRPT (-5.85%), and EMTK (-5.48%).

The balance of trade for Indonesia is predicted to have a surplus of USD3.85bn, compared to the previous month at USD5.09bn.

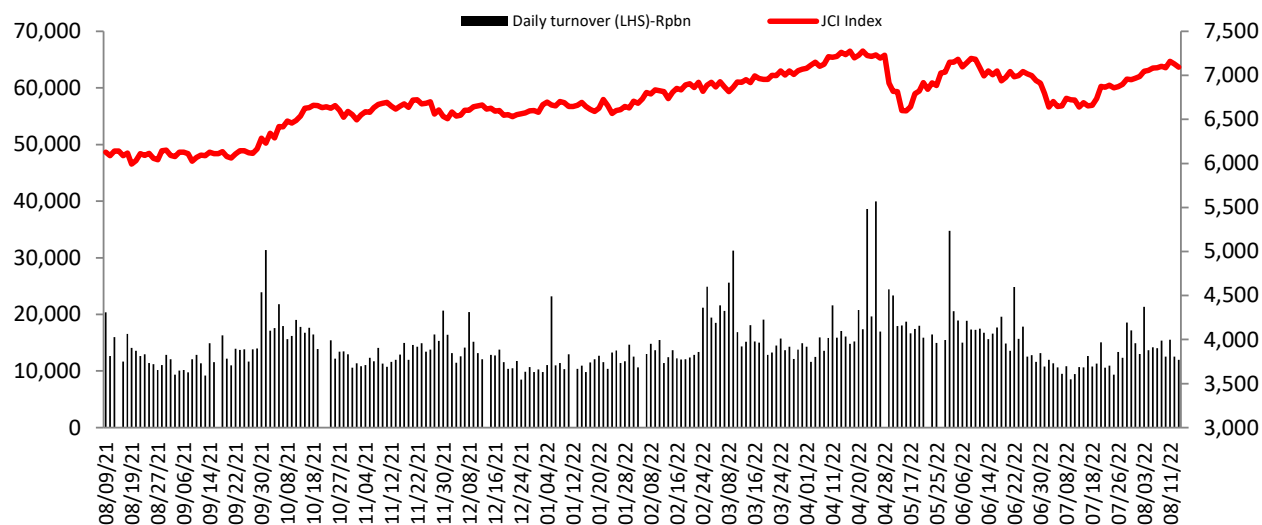
### BOND MARKET

#### GEARING UP FOR NEW SERIES

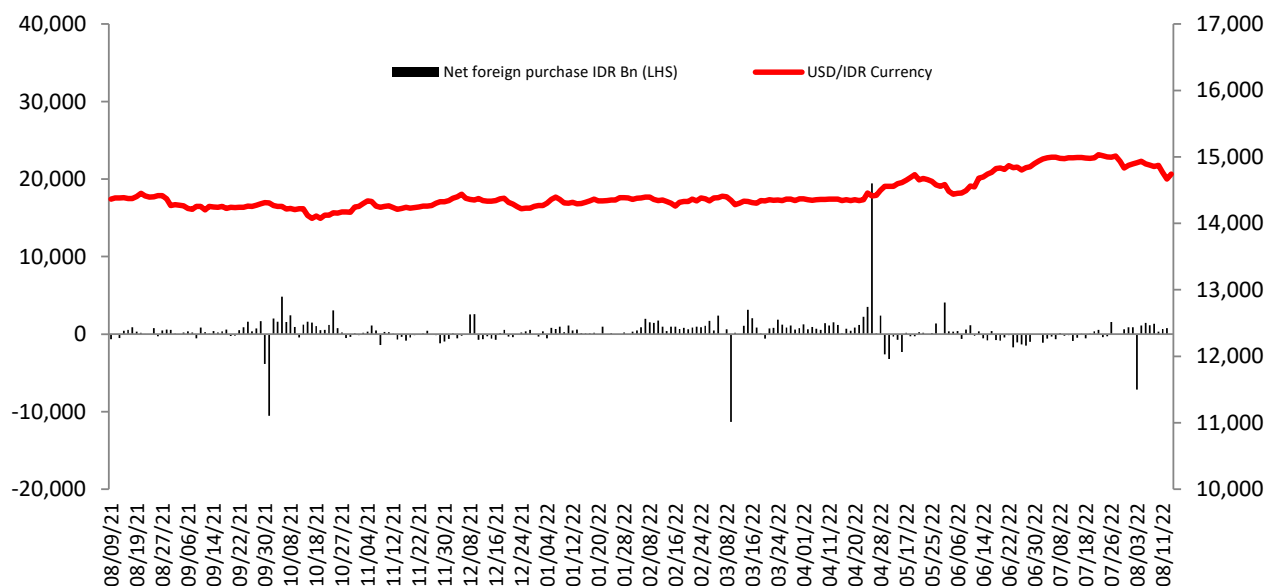
Indonesia bond market opened in offerish tone in what suspected to be an action of freeing up space for tomorrow's bond auction with new series on 5, 10 and 20Y tenor. There will be fresh supply as Indonesia Debt Management Office ("DMO") will hold conventional bond auction tomorrow with IDR 19Tn issuance target (max IDR 28.5Tn). The series that will be issued are 3M SPN, 1Y SPN, 6Y FR95 (new issuance), 11Y FR96 (new issuance), 15Y FR93, 21Y FR97 (new issuance) and 29Y FR89. Selling interest was seen on benchmark series especially on 10Y FR91 which got traded to as low as 95.1 (7.08%). However, bond market was pretty quiet in the second session. Overall, the yield closed the day higher by 5-11bps.

## 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	95.2	(0.1)	(5.6)	5Y
FR82	FR0082 Govt	95.3	(0.6)	(5.4)	10Y
FR80	FR0080 Govt	94.6	(0.2)		15Y
FR83	FR0083 Govt	100.2	0.0	(2.4)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,093.3	(0.5)	7.8	
Thailand	SET Index	1,626.8	0.3	(1.9)	
Korean Stock Exch.	KOSPI Index	2,527.9	0.2	(15.1)	
Straight Times	FSSTI Index	3,258.8	(0.3)	4.3	
Kuala Lumpur	KLCI Index	1,506.4	0.0	(3.9)	
Philippines	PCOMP Index	6,737.8	0.6	(5.4)	
Nikkei	NKY Index	28,871.8	1.1	0.3	
Hang Seng	HSI Index	20,040.9	(0.7)	(14.3)	
MSCI-Asia pacific	MXAP Index	163.1	0.5	(15.6)	
<u>Global Indices</u>					
Dow Jones	INDU Index	33,761.1	1.3	(7.1)	
S&P 500	SPX Index	4,280.2	1.7	(10.2)	
Nasdaq	CCMP Index	13,047.2	2.1	(16.6)	
FTSE 100	UKX Index	7,513.4	0.2	1.7	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,743.0	(0.5)	(3.3)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,810.0	(0.6)	3.9
3 month	IDSWT3M Index	14,673.5	(0.7)	(2.8)
6 month	IDSWT6M Index	14,685.0	(0.7)	(2.9)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,687.5	(0.8)	(2.7)
6 month	IDFWT6M Index	14,845.8	(0.4)	(3.2)
				(2.3)

\*price as of 8/13/2022



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