



FOR PROFESSIONAL INVESTORS - 09/03/2021

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### REBOUNDED

JCI advanced and closed at 6,127 (+49 points or +0.8%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 209Bn today and rupiah was stabilized at IDR 14,263/USD.

Banking stocks were mostly positive as BBRI (+1.55%), BBKA (+0.92%), BBNI (+3.81%), and BMRI (+1.24%) all in green, except BDMN (-3.58%). Consumer names were positive as UNVR (+2.17%), KLBF (+3.97%), HMSP (+1.5%), GGRM (+1.53%), and INDF (+1.16%) all advanced. Mining stocks were positive as PTBA (+4.57%), ADRO (+2.65%), INCO (+1.49%), ANTM (+1.29%), and ITMG (+2.27%) all rose. Construction names were positive as WIKA (+3.26%), PTPP (+3.95%), WSKT (+1.89%), and ADHI (+3.5%) all closed higher. Other movers were UNTR (+5.17%), ARTO (+4.27%), POLL (-6.99%), and BABP (-6.83%).

Financial Services Authority (OJK) decided to extend the relaxation period for bank credit restructuring for 1 year from 31 March 2022 to 31 March 2023. This extension applies to Rural Banks (BPR) and Sharia Rural Banks (BPRS).

### BOND MARKET

#### MUTE

The bond market remained uneventful today. Only few trades were seen in the morning session with light trading volume, while in the afternoon session market went quiet. Prices moved in tight range throughout the day. Overall the yield closed the day lower by around 1 – 2 bps. Next week, on Sept 07th MoF will hold regular Sukuk auction of 6M SPNS, 3Y PBS-031, 5Y PBS-032, 13Y PBS-029, 16Y PBS-004 and 25Y PBS-028 with indicative target of IDR 10Tn.

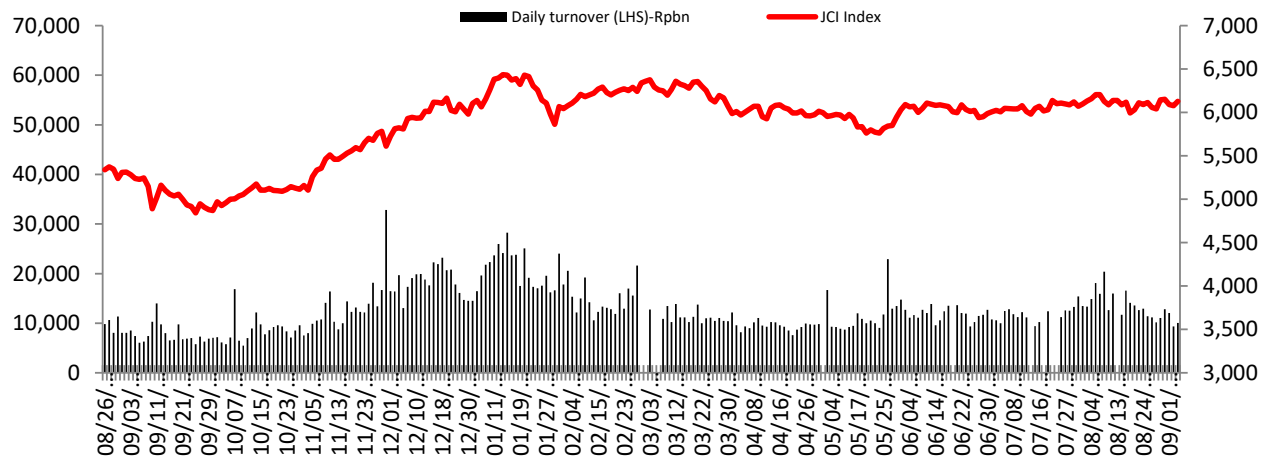


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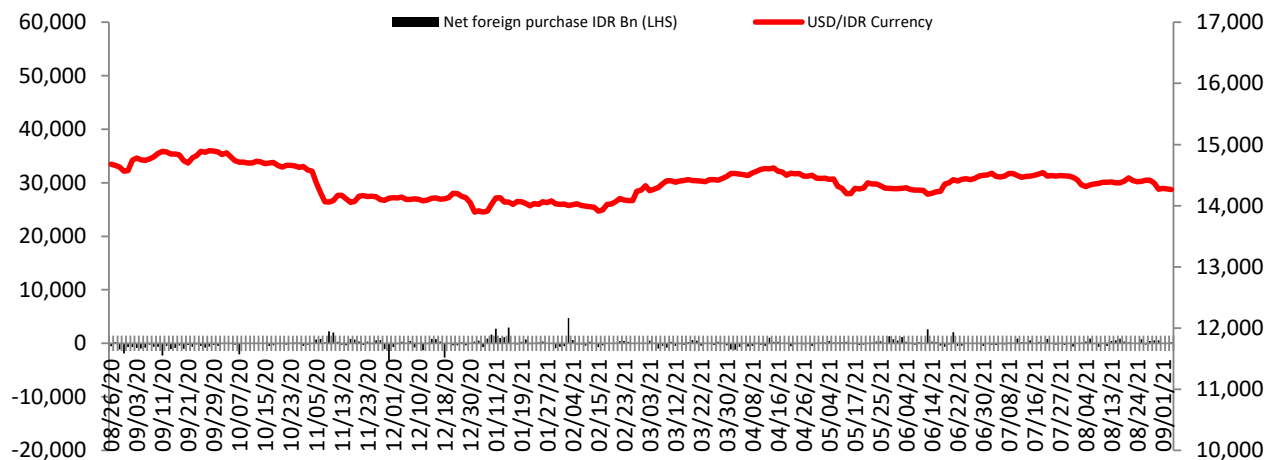
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## GRAPHS & TABLES

### 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    | 101.9    | (0.0)      | 0.2        | 5Y    |
| FR82                  | FR0082 Govt    | 102.9    | (0.0)      | (1.8)      | 10Y   |
| FR80                  | FR0080 Govt    | 99.7     | 0.0        |            | 15Y   |
| FR83                  | FR0083 Govt    | 107.0    | 0.0        | (3.4)      | 20Y   |
| <u>Asia Pacific</u>   |                |          |            |            |       |
| Jakarta Composite     | JCI Index      | 6,126.9  | 0.8        | 2.5        |       |
| Thailand              | SET Index      | 1,650.3  | 0.2        | 13.9       |       |
| Korean Stock Exch.    | KOSPI Index    | 3,201.1  | 0.8        | 11.4       |       |
| Straight Times        | FSSTI Index    | 3,083.9  | (0.2)      | 8.4        |       |
| Kuala Lumpur          | KLCI Index     | 1,589.2  | 0.4        | (2.3)      |       |
| Philippines           | PCOMP Index    | 6,897.1  | 0.9        | (3.4)      |       |
| Nikkei                | NKY Index      | 29,128.1 | 2.0        | 6.1        |       |
| Hang Seng             | HSI Index      | 25,902.0 | (0.7)      | (4.9)      |       |
| MSCI-Asia pacific     | MXAP Index     | 203.2    | 0.1        | 1.6        |       |
| <u>Global Indices</u> |                |          |            |            |       |
| Dow Jones             | INDU Index     | 35,443.8 | 0.4        | 15.8       |       |
| S&P 500               | SPX Index      | 4,537.0  | 0.3        | 20.8       |       |
| Nasdaq                | CCMP Index     | 15,331.2 | 0.1        | 19.0       |       |
| FTSE 100              | UKX Index      | 7,179.7  | 0.2        | 11.1       |       |

|                    | Bloomberg Code | IDR      | % Chg. D-D | % Chg. YTD |
|--------------------|----------------|----------|------------|------------|
| Spot IDR           | IDR Curncy     | 14,263.0 | 0.1        | (1.5)      |
| <u>Swap-IDR</u>    |                |          |            |            |
| 1 month            | IDSWT1M Index  | 14,266.8 | (0.0)      | 1.3        |
| 3 month            | IDSWT3M Index  | 14,290.0 | 0.1        | (1.4)      |
| 6 month            | IDSWT6M Index  | 14,281.3 | (0.1)      | (1.3)      |
| <u>Forward-IDR</u> |                |          |            |            |
| 3 month            | IDFWT3M Index  | 14,326.6 | (0.2)      | (1.2)      |
| 6 month            | IDFWT6M Index  | 14,393.3 | (0.0)      | 0.2        |
|                    |                |          | (0.1)      |            |

\*price as of 9/2/2021


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\* PT BNP Asset Management (address: Sequis Tower, 29<sup>th</sup> Floor, Jl. Jend. Sudirman Kav. 71, SCBD Lot 11B, Jakarta 12190 - INDONESIA).

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