



FOR PROFESSIONAL INVESTORS - 10/08/2020

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

STILL UP

JCI advanced and closed at 5,039 (+35 points or +0.7%) today. Shares across regional markets were mostly positive fueled by optimism that American lawmakers will reach a stimulus deal. Meanwhile, foreign investors recorded net inflow of IDR 50Bn today and rupiah was stabilized at IDR 14,710/USD.

Banking stocks were mostly positive as BNLN (+16.18%), BBRI (+0.96%), BBCA (+0.43%), and MEGA (+2.86%) all advanced, except BMRI (-1.8%). Consumer names were positive as HMSP (+2.98%), GGRM (+2.15%), SIDO (+5.37%), UNVR (+0.31%), and INDF (+1.4%) all closed higher. Material stocks were positive as TPIA (+0.64%) and BRPT (+0.58%) all up. Properties names were mixed as PWON (+4.52%) and SMRA (+4.42%) in green, while BSDE (-0.64%) and LPKR (-3.05%) weakened. Other movers were SCMA (+5.08%), ASII (+2.59%), TAMU (-6.67%), and BOGA (-5.1%).

Indonesia's foreign exchange reserves decreased during Sep 2020. Bank Indonesia recorded reduced foreign exchange reserves by US\$ 1.8Bn from US\$ 137.04Bn to US\$ 135.15Bn.

BOND MARKET

FLAT TRADING DAY

It was another slow day for the bond market with no supportive catalyst was seen. No significant trading was heard in the market at least from our end. Market players were defensive and stay sidelined throughout the day. The benchmark series of 5, 10, 15 and 20Y closed at mid-yield of 5.77%, 6.88%, 7.39% and 7.41% respectively. In the middle of the day, Bank Indonesia announced has bought IDR 46.2Tn in another private placement.

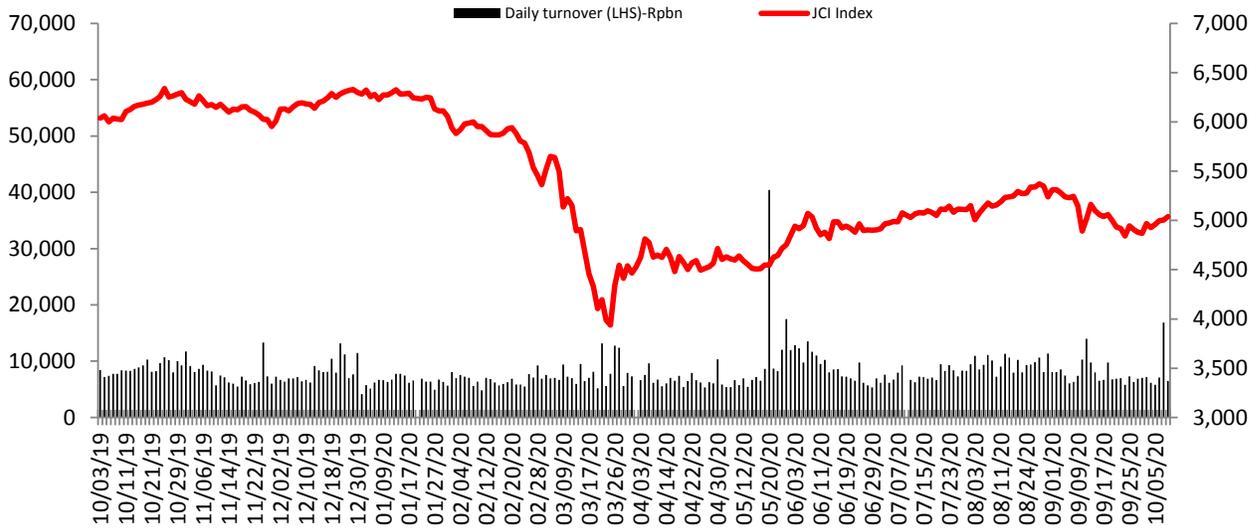


BNP PARIBAS
ASSET MANAGEMENT

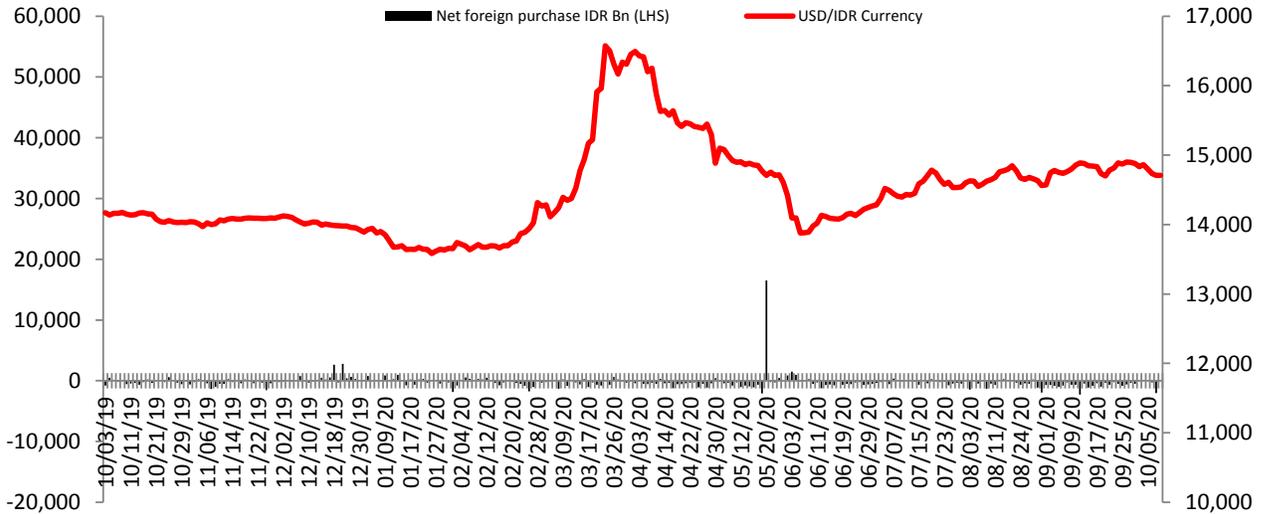
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GRAPHS & TABLES

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	103.0	(0.0)	2.4	5Y
FR82	FR0082 Govt	100.8	(0.0)	1.3	10Y
FR80	FR0080 Govt	100.9	0.0	0.5	15Y
FR83	FR0083 Govt	100.9	0.0	1.4	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	5,039.1	0.7	(20.0)	
Thailand	SET Index	1,274.8	0.9	(19.3)	
Korean Stock Exch.	KOSPI Index	2,392.0	0.2	8.8	
Straight Times	FSSTI Index	2,543.1	0.2	(21.1)	
Kuala Lumpur	KLCI Index	1,519.4	2.0	(4.4)	
Philippines	PCOMP Index	5,942.7	1.3	(24.0)	
Nikkei	NKY Index	23,647.1	1.0	(0.0)	
Hang Seng	HSI Index	24,193.4	(0.2)	(14.2)	
MSCI-Asia pacific	MXAP Index	173.9	0.4	1.9	
<u>Global Indices</u>					
Dow Jones	INDU Index	28,303.5	1.9	(0.8)	
S&P 500	SPX Index	3,419.5	1.7	5.8	
Nasdaq	CCMP Index	11,364.6	1.9	26.7	
FTSE 100	UKX Index	5,959.0	0.2	(21.0)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,710.0	0.0	(5.7)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,768.0	(0.6)	5.6
3 month	IDSWT3M Index	14,751.9	0.0	(6.4)
6 month	IDSWT6M Index	14,768.0	0.2	(6.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,794.7	0.3	(6.1)
6 month	IDFWT6M Index	14,965.0	0.6	(5.5)
			(0.0)	

*price as of 10/7/2020

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