

FOR PROFESSIONAL INVESTORS - 07/21/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Closing Bounce

JCI slightly weakened and closed at 6,864 (-11 points or -0.15%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 539Bn today and rupiah slightly weakened to IDR 15,033/USD.

Banking stocks were positive as MEGA (+2.86%), BBRI (+0.23%), BBNI (+0.65%), PNB ( +3.55%), and BBTN (+0.34%) all advanced. Consumer names were mostly positive as INDF (+1.06%), UNVR (+0.6%), ICBP (+0.53%), and SIDO (+1.55%) all rose, except KLBF (-2.89%). Telco stocks were mixed as TLKM (+1.19%) and FREN (+3.57%) in green, while EXCL (-2.77%) retreated. Poultry names were positive as CPIN (+1.69%), JPFA (+0.98%), and MAIN (+0.81%) all advanced. Other movers were DNET (+17.84%), BIPI (+8.57%), BTPS (-4.3%), and ARTO (-3.26%).

Investments in 2022Q2 have reached IDR 302.2tn, a 7% increase from the previous quartile. 1H2022 is 35% more than 1H2021 at IDR584.6tn, and is already halfway to reaching the IDR1,200tn target for 2022.

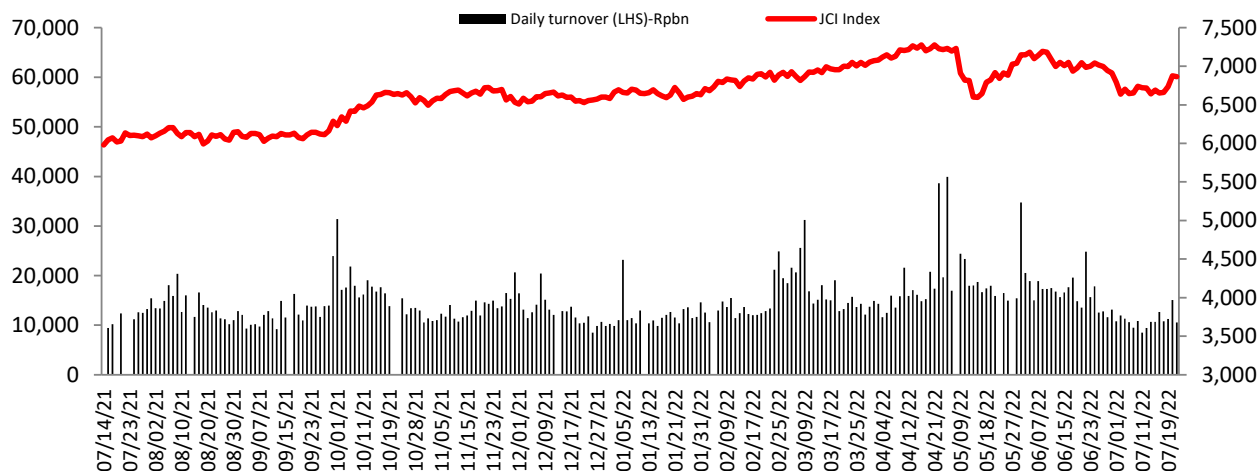
### BOND MARKET

#### BI RATE UNCHANGED

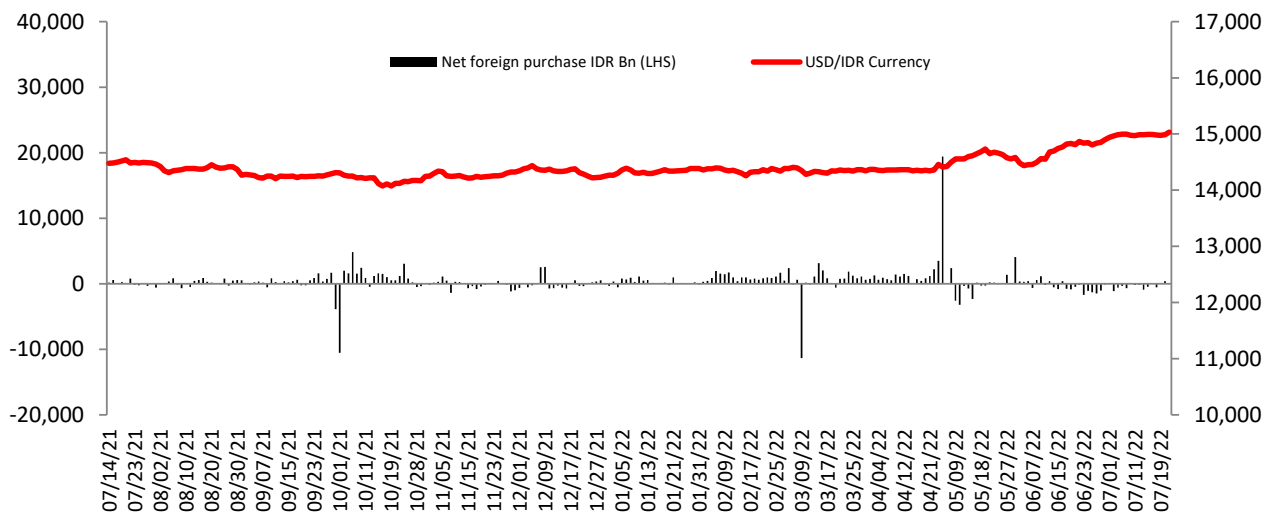
There was not much happening in the bond market today as players shied away from secondary. Indonesia bond market opened weaker and wider. Rupiah opened at level 14990/15000 today. In the secondary market few trades done across the curve with 10Y FR91 traded at 7.44%. Nearing end of trading day, Bank Indonesia decided to keep its 7days reverse repo rate unchanged at 3.5% as market expectation and the decision received relatively mute reaction from the market. While Rupiah post weaker after the BI rate announcement.

## GRAPHS & TABLES

### JCI & DAILY TURNOVER



### IDR & NET FOREIGN PURCHASES



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## EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
<u>Bonds</u>					
FR81	FR0081 Govt	93.6	(0.2)	(7.2)	5Y
FR82	FR0082 Govt	92.5	(0.1)	(8.2)	10Y
FR80	FR0080 Govt	91.4	0.1		15Y
FR83	FR0083 Govt	95.3	(0.2)	(7.2)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,864.1	(0.2)	4.3	
Thailand	SET Index	1,544.0	0.3	(6.9)	
Korean Stock Exch.	KOSPI Index	2,409.2	0.9	(19.1)	
Straight Times	FSSTI Index	3,154.4	(0.5)	1.0	
Kuala Lumpur	KLCI Index	1,450.2	0.9	(7.5)	
Philippines	PCOMP Index	6,256.2	(0.3)	(12.2)	
Nikkei	NKY Index	27,803.0	0.4	(3.4)	
Hang Seng	HSI Index	20,574.6	(1.5)	(12.1)	
MSCI-Asia pacific	MXAP Index	158.5	1.3	(17.9)	
<u>Global Indices</u>					
Dow Jones	INDU Index	31,874.8	0.2	(12.3)	
S&P 500	SPX Index	3,959.9	0.6	(16.9)	
Nasdaq	CCMP Index	11,897.7	1.6	(24.0)	
FTSE 100	UKX Index	7,236.9	(0.4)	(2.0)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,033.0	(0.3)	(5.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,990.0	(0.1)	5.1
3 month	IDSWT3M Index	14,993.2	0.0	(5.0)
6 month	IDSWT6M Index	14,994.2	0.0	(5.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	154.8	(1.3)	98.9
6 month	IDFWT6M Index	1,567.9	(89.7)	89.1
			(0.3)	(6.4)

\*price as of 7/21/2022

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