



FOR PROFESSIONAL INVESTORS - 07/16/2021

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### HIGHER CLOSE

JCI slightly strengthened and closed at 6,073 (+26 points or +0.43%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 75Bn today and rupiah slightly weakened to IDR 14,498/USD.

Banking stocks were mostly positive as BBRI (+0.79%), BBNI (+1.91%), MEGA (+1.28%), and PNBK (+2.7%) all inched higher, except BBCA (-0.08%). Cement names were positive as SMGR (+4.42%), INTP (+3.13%), SMCB (+2.96%), and SMBR (+3.6%) all up. Consumer stocks were mixed as MYOR (+2.54%), KLBF (+1.83%), and HMSP (+0.45%) in green, while GGRM (-1.23%) and ICBP (-1.15%) declined. Mining names were positive as INCO (+2.39%), TINS (+4.31%), ADRO (+1.22%), PTBA (+1.43%), and ANTM (+0.38%) all up. Other movers were AKRA (+9.87%), ARTO (+5.3%), BSIM (-6.32%), and DSSA (-6.11%).

Indonesia recorded trade surplus of US\$1.3bn in Jun-21, lower than consensus figure of US\$2.2bn. The trade surplus narrowed in June, as import surges higher vs export. Import reached US\$17.2bn (+21% MoM, +60.1% YoY), which is higher than cons expectation of +44.94% YoY. Export was at US\$18.5bn (+9.5% MoM, +54.1% YoY), which also surpassed cons forecast of +48.45% YoY.

### BOND MARKET

#### CLOSED THE WEEK HIGHER

Indonesia bond market closed the week with lower yield around 3 – 6 bps. Buying interest from mixed players remains thick in the air especially on 5Y - 10Y areas. We did see some profit takers came in to the market in the second session, however the sentiment still positive throughout the day. The yield curve closed slightly lower with benchmark series of 5Y/10Y/15Y/20Y closed at mid-yield 5.29%/6.32%/6.35%/7.07%.

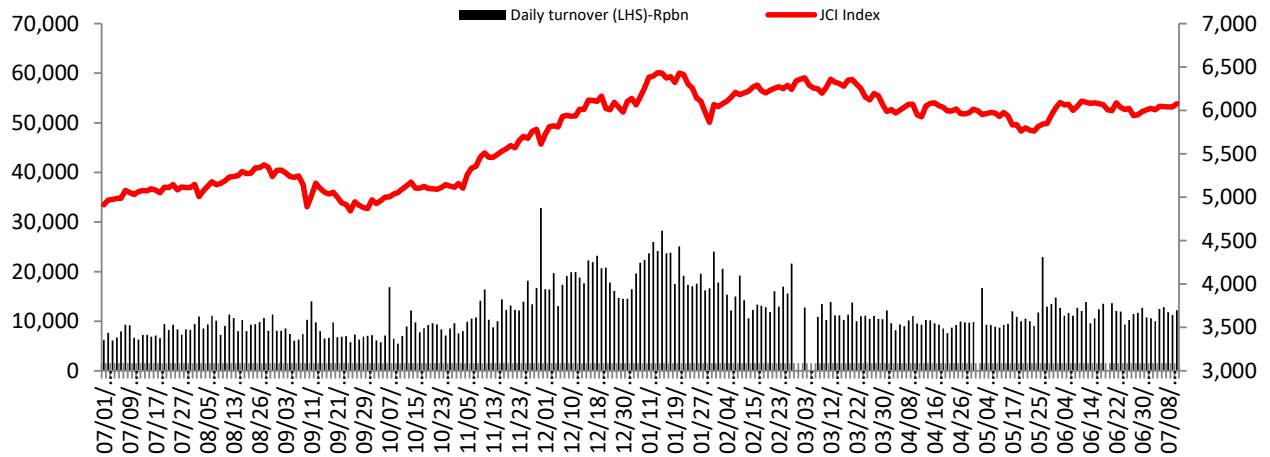


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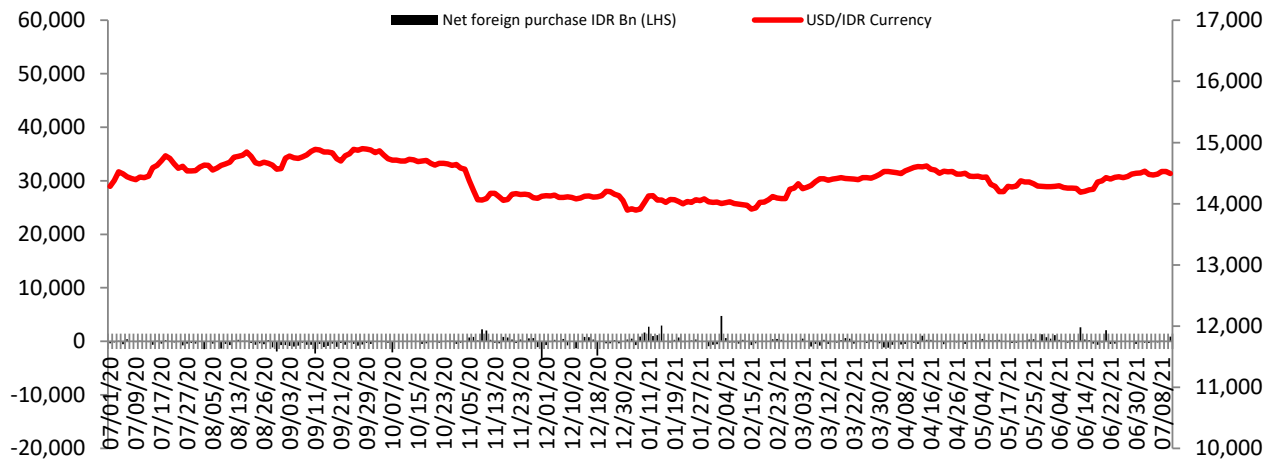
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# GRAPHS & TABLES

## 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	100.8	0.1	(0.9)	5Y
FR82	FR0082 Govt	101.1	0.2	(3.5)	10Y
FR80	FR0080 Govt	99.0	(0.0)		15Y
FR83	FR0083 Govt	104.3	0.0	(5.9)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,072.5	0.4	1.6	
Thailand	SET Index	1,574.4	0.2	8.6	
Korean Stock Exch.	KOSPI Index	3,276.9	(0.3)	14.0	
Straight Times	FSSTI Index	3,152.3	0.4	10.8	
Kuala Lumpur	KLCI Index	1,522.5	0.1	(6.4)	
Philippines	PCOMP Index	6,693.8	(0.5)	(6.2)	
Nikkei	NKY Index	28,003.1	(1.0)	2.0	
Hang Seng	HSI Index	28,004.7	0.0	2.8	
MSCI-Asia pacific	MXAP Index	206.0	0.2	3.0	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,987.0	0.2	14.3	
S&P 500	SPX Index	4,360.0	(0.3)	16.1	
Nasdaq	CCMP Index	14,543.1	(0.7)	12.8	
FTSE 100	UKX Index	7,017.1	0.1	8.6	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,498.0	(0.1)	(3.1)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,495.0	0.0	2.9
3 month	IDSWT3M Index	14,503.9	0.1	(2.9)
6 month	IDSWT6M Index	14,504.2	0.1	(2.9)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,547.6	0.1	(2.7)
6 month	IDFWT6M Index	14,615.0	0.2	(1.4)

\*price as of 7/15/2021

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