



FOR PROFESSIONAL INVESTORS - 08/03/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

EDGED HIGHER

JCI advanced and closed at 6,131 (+34 points or +0.56%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 3Bn today and rupiah advanced to IDR 14,342/USD.

Banking stocks were positive as BBKA (+3.1%), BMRI (+1.76%), BBNI (+2.7%), PNBK (+6.67%), and BBRI (+0.27%) all rose. Consumer names were mostly positive as HMSP (+1.43%), ICBP (+1.23%), GGRM (+1.07%), and KLBF (+0.77%) all closed higher, except UNVR (-0.45%). Cement stocks were mixed as SMGR (+6.41%), INTG (+6.78%), and SMDR (+6.84%) closed higher, while SMCB unchanged. Telco names were positive as TLKM (+0.6%), FREN (+3.18%), and EXCL (+0.38%) all inched higher. Other movers were BKSJ (+25%), MSIN (+24.46%), HRUM (-6.9%), and MAYA (-6.69%).

Indonesia Stock Exchange recorded that the value of fundraising through rights issue reached Rp35.7tn in 7M21, an increase of 302% YoY.

BOND MARKET

AUCTION DAY

Indonesia bond market start the day with bullish tone despite new supply in today auction. We heard mixed players was looking to buy 5Y – 10Y tenor. After MoF released the highest incoming bids data YtD which amounts to IDR 107.78Tn, price quotation went up by 15-25bps. Unabsorbed bidder turned to secondary market. Overall, yield higher around 1 – 5 bps.

In today auction, MoF managed to upsize issuance to IDR 34Tn (initial target: IDR 33Tn). The series absorbed (against incoming bids) on the auction were IDR 1Tn (IDR 9.91Tn) 3mo SPN, IDR 2Tn (IDR 8.25Tn) 9mo SPN, IDR 10.5Tn (IDR 26.317Tn) 6Y FR90, IDR 12.35Tn (IDR 38.575Tn) 11Y FR91, IDR 0.75Tn (IDR 4.308Tn) 15Y FR88, IDR 6.6Tn (IDR 16.679Tn) 21Y FR92 and IDR 0.80Tn (IDR 2.743Tn) 30Y FR89 at weighted average yields of 2.82%, 3.12%, 5.22%, 6.28%, 6.30%, 6.92% and 6.88% respectively.

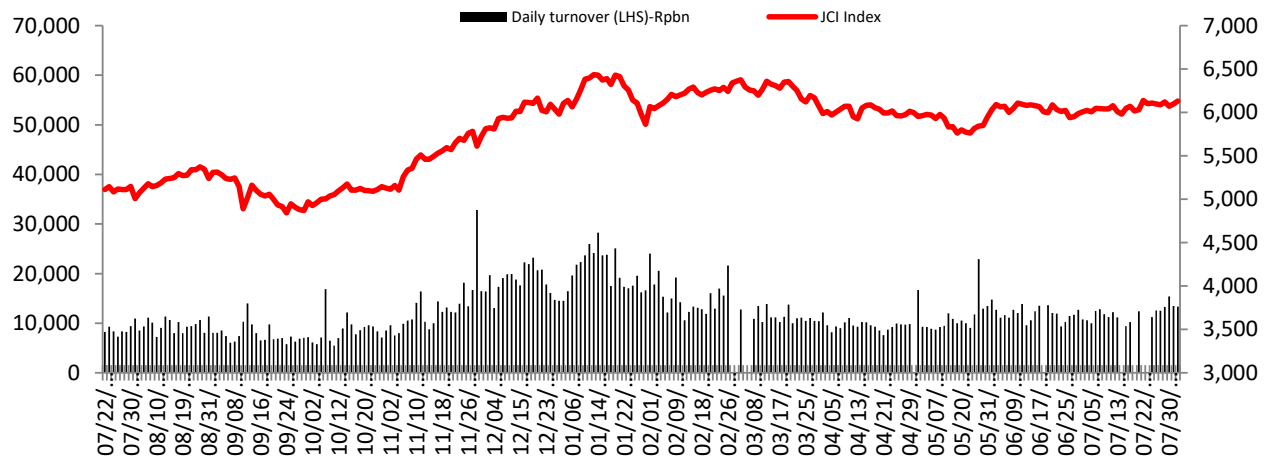


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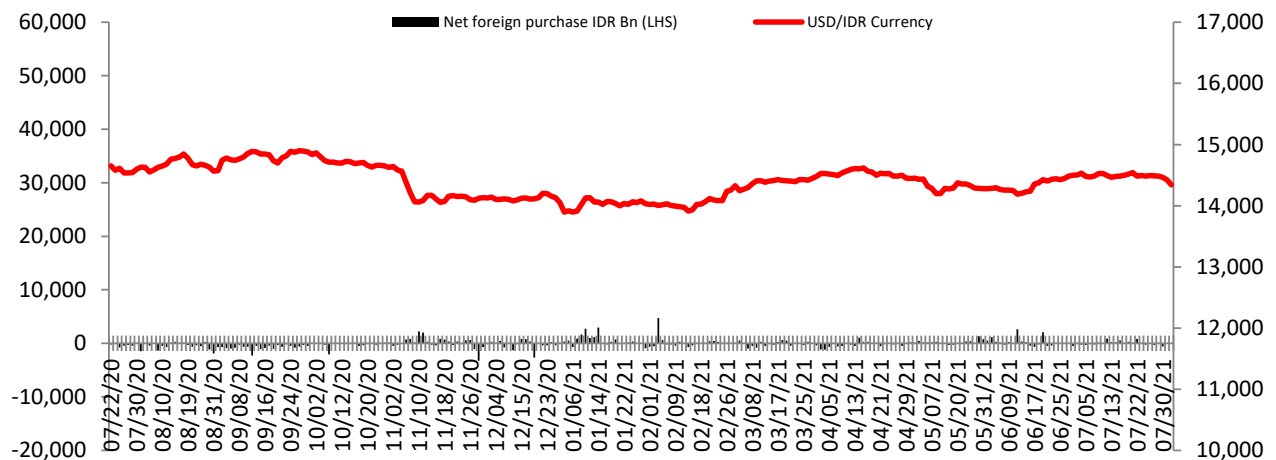
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GRAPHS & TABLES

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	101.6	0.1	(0.1)	5Y
FR82	FR0082 Govt	101.8	0.2	(2.8)	10Y
FR80	FR0080 Govt	99.6	(0.1)		15Y
FR83	FR0083 Govt	105.4	0.0	(4.9)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,130.6	0.6	2.5	
Thailand	SET Index	1,540.5	1.0	6.3	
Korean Stock Exch.	KOSPI Index	3,237.1	0.4	12.7	
Straight Times	FSSTI Index	3,149.3	(0.4)	10.7	
Kuala Lumpur	KLCI Index	1,500.3	0.5	(7.8)	
Philippines	PCOMP Index	6,560.1	1.8	(8.1)	
Nikkei	NKY Index	27,641.8	(0.5)	0.7	
Hang Seng	HSI Index	26,194.8	(0.2)	(3.8)	
MSCI-Asia pacific	MXAP Index	200.6	1.7	0.4	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,838.2	(0.3)	13.8	
S&P 500	SPX Index	4,387.2	(0.2)	16.8	
Nasdaq	CCMP Index	14,681.1	0.1	13.9	
FTSE 100	UKX Index	7,107.3	0.4	10.0	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,342.0	0.6	(2.0)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,453.8	(0.1)	2.6
3 month	IDSWT3M Index	14,459.8	0.0	(2.6)
6 month	IDSWT6M Index	14,451.7	(0.1)	(2.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,517.3	0.1	(2.5)
6 month	IDFWT6M Index	14,562.2	0.0	(1.0)

*price as of 8/2/2021


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