



FOR PROFESSIONAL INVESTORS - 10/08/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

RETREATED

JCI weakened and closed at 7,027 (-50 points or -0.7%) today. Shares across regional markets were negative. Meanwhile, foreign investors recorded net outflow of IDR 1.3Tn today and rupiah slightly weakened to IDR 15,253/USD.

Banking stocks were mostly negative as MEGA (-2.22%), BBNI (-1.4%), BBRI (-1.55%), and BBKA (-2.67%) all down, except BMRI (+1.07%). Telco names were negative as FREN (-3.7%), ISAT (-3.53%), and TLKM (-1.81%) all corrected. Consumer stocks were mixed as MYOR (+2.48%) and ICBP (+0.85%) up, while KLBF (-0.27%), INDF (-0.41%), and UNVR (-1.22%) closed lower. Infra names were negative as JSMR (-0.3%), PGAS (-0.57%), TOWR (-0.83%), and TBIG (-2.15%) all weakened. Other movers were BUMI (+14.11%), LPPF (+9.45%), INKP (-2.89%), and AKRA (-2.85%).

Ministry of Public Works and public housing will announce new toll road tariff on 7 October 2022. There are 11 toll roads that will implement new tariff until the end of 2022.

BOND MARKET

SOFTER

IDR bond market remained quiet in the morning session with bond price quoted slightly lower compared to yesterday closing. Buying interest were seen in the front to 3Y tenor area driven by local players with 7mo FR63 got taken to as high as 100.25 (5.18%) while 2Y FR70 repeatedly traded at 103.05 (6.11%). Meanwhile belly area saw offerish bias especially after London market open with yield ended up slightly higher by 1-5bps. Overall, yield curve closed mixed with benchmark series of 5, 10, 15 and 20Y closed at mid-yield of 6.67%, 7.18%, 7.18% and 7.24% respectively.

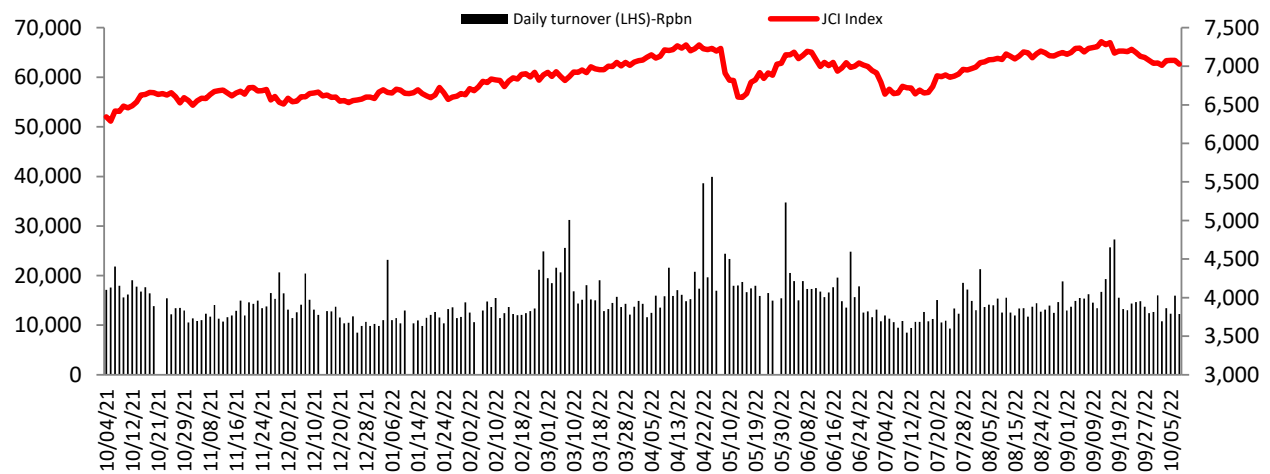


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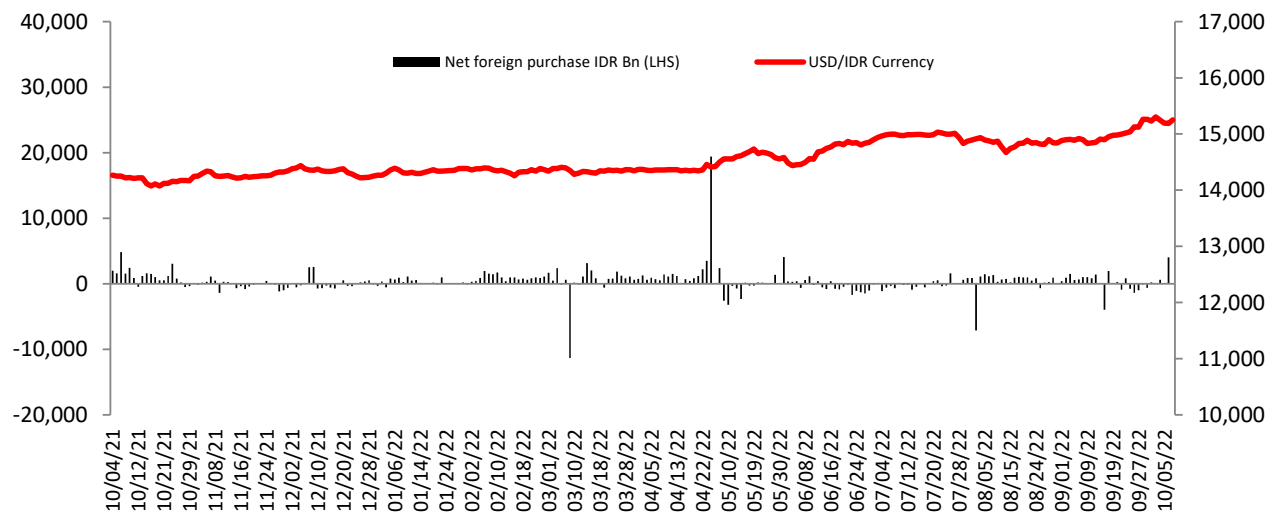
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GRAPHS & TABLES

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	94.0	(0.1)	(6.8)	5Y
FR82	FR0082 Govt	94.3	(0.3)	(6.5)	10Y
FR80	FR0080 Govt	92.6	(0.2)		15Y
FR83	FR0083 Govt	98.7	(0.0)	(3.8)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,026.8	(0.7)	6.8	
Thailand	SET Index	1,579.4	(0.6)	(4.7)	
Korean Stock Exch.	KOSPI Index	2,232.8	(0.2)	(25.0)	
Straight Times	FSSTI Index	3,143.8	(0.2)	0.6	
Kuala Lumpur	KLCI Index	1,406.0	(1.0)	(10.3)	
Philippines	PCOMP Index	5,932.2	(0.0)	(16.7)	
Nikkei	NKY Index	27,116.1	(0.7)	(5.8)	
Hang Seng	HSI Index	17,740.1	(1.5)	(24.2)	
MSCI-Asia pacific	MXAP Index	144.7	0.1	(25.1)	
<u>Global Indices</u>					
Dow Jones	INDU Index	29,926.9	(1.1)	(17.6)	
S&P 500	SPX Index	3,744.5	(1.0)	(21.4)	
Nasdaq	CCMP Index	11,073.3	(0.7)	(29.2)	
FTSE 100	UKX Index	7,006.0	0.1	(5.1)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,253.0	(0.4)	(6.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,176.4	(0.8)	6.4
3 month	IDSWT3M Index	15,197.1	0.1	(6.5)
6 month	IDSWT6M Index	15,194.6	(0.1)	(6.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,212.4	0.2	(6.3)
6 month	IDFWT6M Index	15,255.0	(0.1)	(6.1)
				(6.1)

*price as of 10/7/2022


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