



FOR PROFESSIONAL INVESTORS - 10/28/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

ANOTHER CORRECTION

JCI weakened and closed at 6,524 (-78 points or -1.18%) today. Shares across regional markets were negative. Meanwhile, foreign investors recorded net outflow of IDR 505Bn today and rupiah was stabilized at IDR 14,173/USD.

Banking stocks were negative as BBNI (-0.35%), BDMN (-5.28%), BMRI (-1.75%), BBRI (-1.17%), and BBCA (-1.01%) all weakened. Consumer names were negative as SIDO (-3.53%), HMSP (-0.95%), MYOR (-2.51%), GGRM (-2.83%), and UNVR (-2.2%) all declined. Mining stocks were negative as INDY (-3.72%), ANTM (-1.28%), PTBA (-5.04%), ITMG (-6.94%), and ADRO (-5.78%) all declined. Material names were negative as BRPT (-4.62%) and TPIA (-2.94%) all weakened. Other movers were MLPL (+8.33%), MPPA (+6.4%), SRTG (-6.58%), and UNTR (-6.12%).

As of the third quarter of 2021, bank lending reached Rp5639.4tn, growing 2% YoY. Credit growth occurred in individual and corporate loans. For individual loans, banks have disbursed loans amounting to Rp2703.9tn, growing 5.1% YoY. Corporate loans still contracted YoY at -0.4%, but higher than the previous month which was at -1.8% YoY.

BOND MARKET

LIMITED ACTIVITY

IDR bond market opened the day with prices quoted unchanged despite the 10Y UST yield overnight drop. The bond market received mixed sentiment today with general tone biased on profit taking. The yield of IDR benchmark series went higher by 2 – 5 bps across the board. In the morning session, trading activity mostly concentrated on the front and longer tenor. While in the afternoon session, market saw less trading.

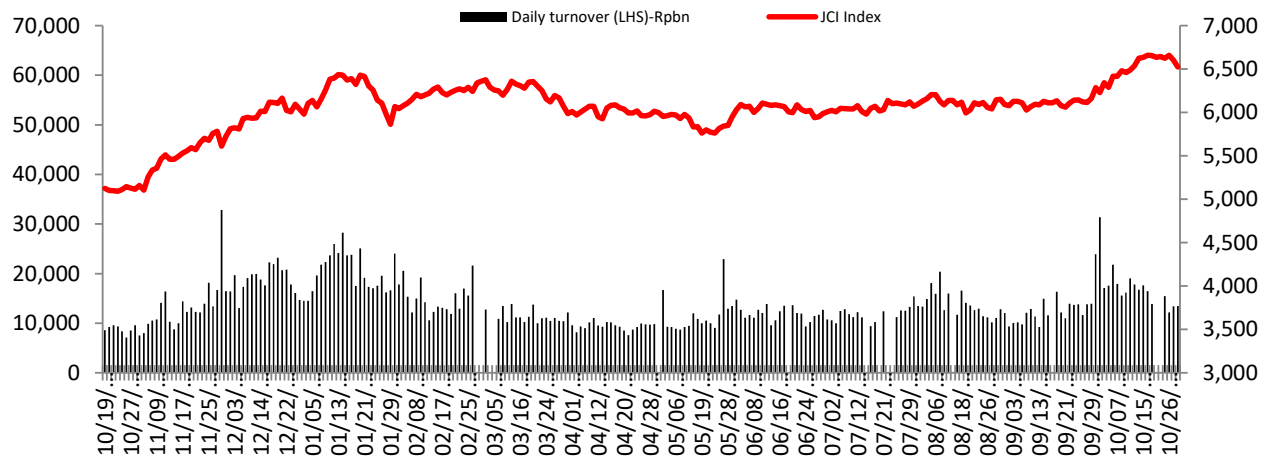


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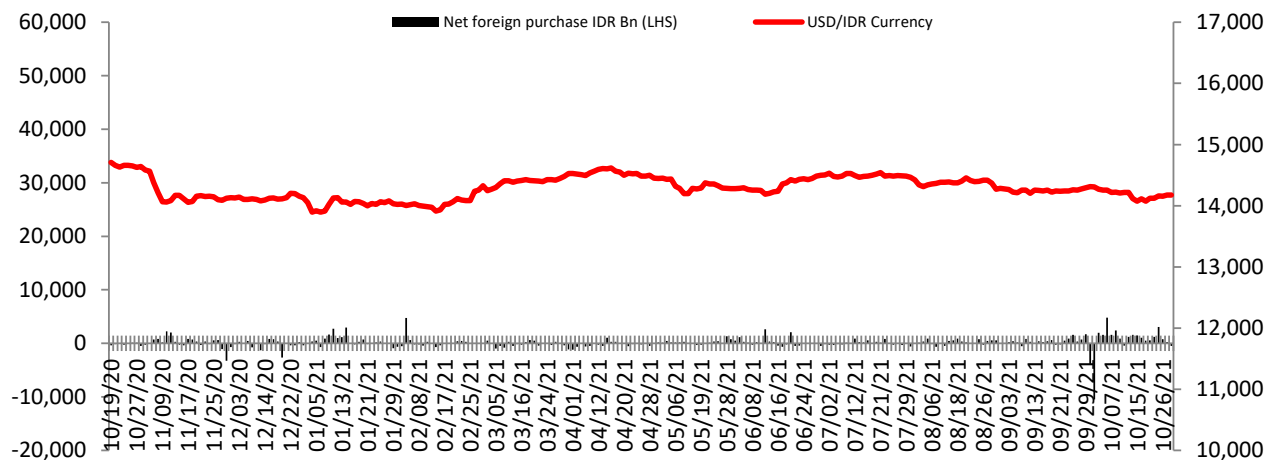
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GRAPHS & TABLES

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	101.7	(0.1)	0.0	5Y
FR82	FR0082 Govt	102.4	(0.1)	(2.2)	10Y
FR80	FR0080 Govt	99.8	(0.1)		15Y
FR83	FR0083 Govt	105.2	(0.1)	(5.0)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,524.1	(1.2)	9.1	
Thailand	SET Index	1,624.3	(0.2)	12.1	
Korean Stock Exch.	KOSPI Index	3,009.6	(0.5)	4.7	
Straight Times	FSSTI Index	3,203.8	(0.4)	12.7	
Kuala Lumpur	KLCI Index	1,566.9	(1.0)	(3.7)	
Philippines	PCOMP Index	7,157.7	(1.0)	0.3	
Nikkei	NKY Index	28,820.1	(1.0)	5.0	
Hang Seng	HSI Index	25,555.7	(0.3)	(6.2)	
MSCI-Asia pacific	MXAP Index	199.6	(0.5)	(0.2)	
<u>Global Indices</u>					
Dow Jones	INDU Index	35,490.7	(0.7)	16.0	
S&P 500	SPX Index	4,551.7	(0.5)	21.2	
Nasdaq	CCMP Index	15,235.8	0.0	18.2	
FTSE 100	UKX Index	7,236.3	(0.2)	12.0	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,173.0	0.0	(0.9)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,159.9	(0.1)	0.5
3 month	IDSWT3M Index	14,180.2	0.1	(0.6)
6 month	IDSWT6M Index	14,183.1	0.1	(0.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,213.6	0.1	(0.4)
6 month	IDFWT6M Index	14,310.0	0.5	0.7

*price as of 10/27/2021


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