

FOR PROFESSIONAL INVESTORS - 08/11/2023

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Higher

JCI slightly strengthened and closed at 6,893 (+18 points or +0.26%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 17.9tn today and rupiah was stabilized at IDR 15,185/USD.

Banking stocks were mixed as BMRI (+1.27%) and BBNI (+0.28%) rose, while BBTN (-0.77%), PNBN (-2.93%), and MEGA (-0.97%) corrected. Consumer names were mixed as ICBP (+3.15%) and INDF (+1.43%) up, while HMSP (-1.12%), UNVR (-1.08%), and KLBF (-1.6%) declined. Pulp & paper stocks were positive as TKIM (+3.44%) and INKP (+0.51%) all in green. Properties names were negative as CTRA (-0.9%), SMRA (-2.24%), PWON (-2.08%), and BSDE (-2.54%) all declined. Other movers were IMAS (+20.45%), ESSA (+8.04%), FILM (-5.68%), and DNET (-2.67%).

Indonesia retail sales came at 7.9% y-y in Jun23 (prev: -4.5%). Sales of food, clothing, and fuels led the increase while auto parts/accessories continue to decline.

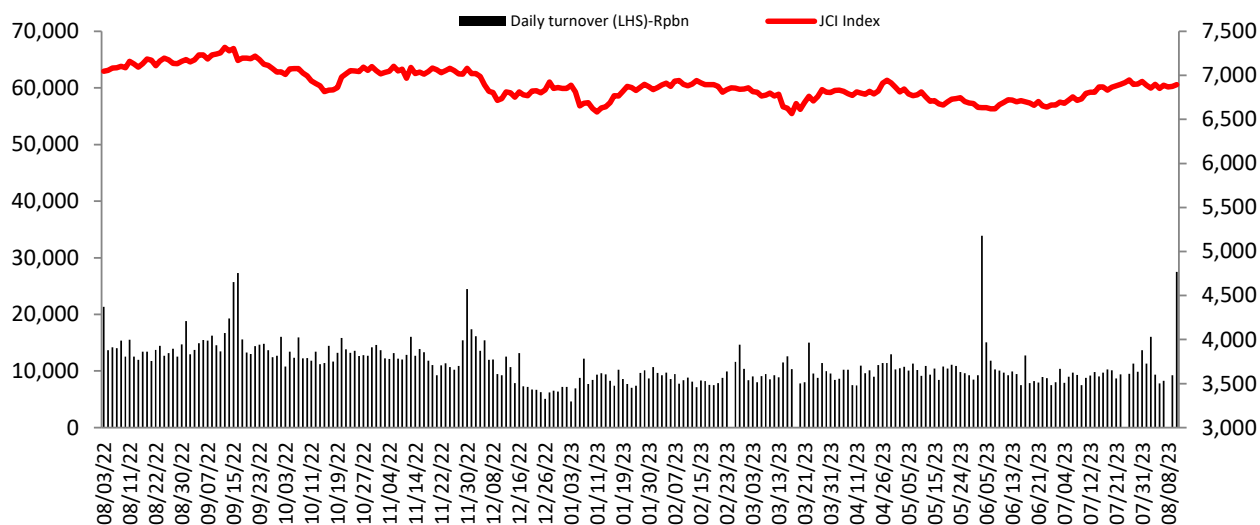
BOND MARKET

LACKLUSTER TRADING

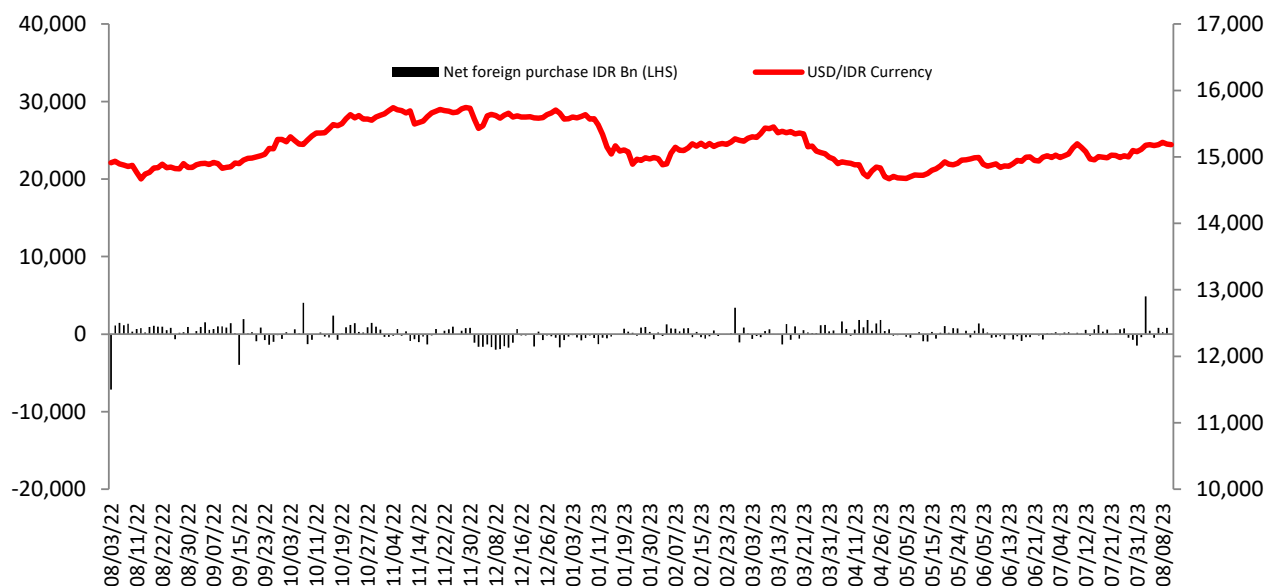
Bond market opened wider as price quotation continued its upward movement from yesterday. Several mixed activities were seen especially on middle tenor benchmark and non-benchmark series but the trade volumes were small until the trading session end. Stronger bond was in line with that in USD/IDR as the pair closed lower at 15,185. In the meantime, market are waiting for US CPI tonight.

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>					
FR90	FR0090 Govt	97.5	(0.0)	1.3	5Y
FR91	FR0091 Govt	100.3	0.1	4.1	10Y
FR93	FR0093 Govt	100.4	0.0	3.6	15Y
FR92	FR0092 Govt	105.2	0.1	4.9	20Y
PBS036	INDOIS 5 ½ 08/15/25	98.9	(0.0)	1.3	15-8-2025
PBS003	INDOIS 6 01/15/27	100.6	0.0	2.3	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	103.5	(0.1)		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	101.0	0.1	7.3	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,893.3	0.3	0.6	
Thailand	SET Index	1,533.4	0.3	(8.1)	
Korean Stock Exch.	KOSPI Index	2,601.6	(0.1)	16.3	
Straight Times	FSSTI Index	3,322.9	0.3	2.2	
Kuala Lumpur	KLCI Index	1,458.9	(0.2)	(2.4)	
Philippines	PCOMP Index	6,449.7	(1.2)	(1.8)	
Nikkei	NKY Index	32,473.7	0.8	24.4	
Hang Seng	HSI Index	19,248.3	0.0	(2.7)	
MSCI-Asia pacific	MXAP Index	164.8	(0.0)	5.8	
<u>Global Indices</u>					
Dow Jones	INDU Index	35,123.4	(0.5)	6.0	
S&P 500	SPX Index	4,467.7	(0.7)	16.4	
Nasdaq	CCMP Index	13,722.0	(1.2)	31.1	
FTSE 100	UKX Index	7,586.2	(0.0)	1.8	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,185.0	0.0	2.5
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,200.0	(0.1)	(3.3)
3 month	IDSWT3M Index	15,204.7	(0.1)	2.4
6 month	IDSWT6M Index	15,230.5	0.3	2.2
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,208.4	(0.2)	2.3
6 month	IDFWT6M Index	15,217.9	(0.3)	2.7

*price as of 8/9/2023


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