

FOR PROFESSIONAL INVESTORS - 01/03/2023

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Bounce

JCI advanced and closed at 6,889 (+38 points or +0.55%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 149Bn today and rupiah slightly weakened to IDR 15,598/USD.

Banking stocks were mixed as BMRI (+0.76%) and BBNI (+0.54%) rose, while BBTN (-1.12%), PNBK (-4.08%), and BBRI (-0.41%) retreated. Consumer names were mixed as KLBF (+2.91%) and MYOR (+2.01%) in green, while INDF (-0.37%), UNVR (-0.43%), and HMSP (-1.82%) corrected. Telco stocks were positive as TLKM (+1.58%), EXCL (+8.29%), and ISAT (+4.56%) all closed higher. Hospital names were positive as MIKA (+3.03%), HEAL (+1.58%), and SILO (+1.19%) all in green. Other movers were BRIS (+8.56%), BRPT (+5.88%), CMNP (-6.86%), and PNLF (-4.52%).

The Bureau of Statistics recorded inflation inching up to 5.51% in Dec-22 from 5.42% in Nov-22, exceeding the Central Bank's latest target (5.4%). The biggest contributors to inflation were food, beverage, and tobacco. On the other hand, core inflation also edged up to 3.36% in Dec-22 from 3.30% in Nov-22.

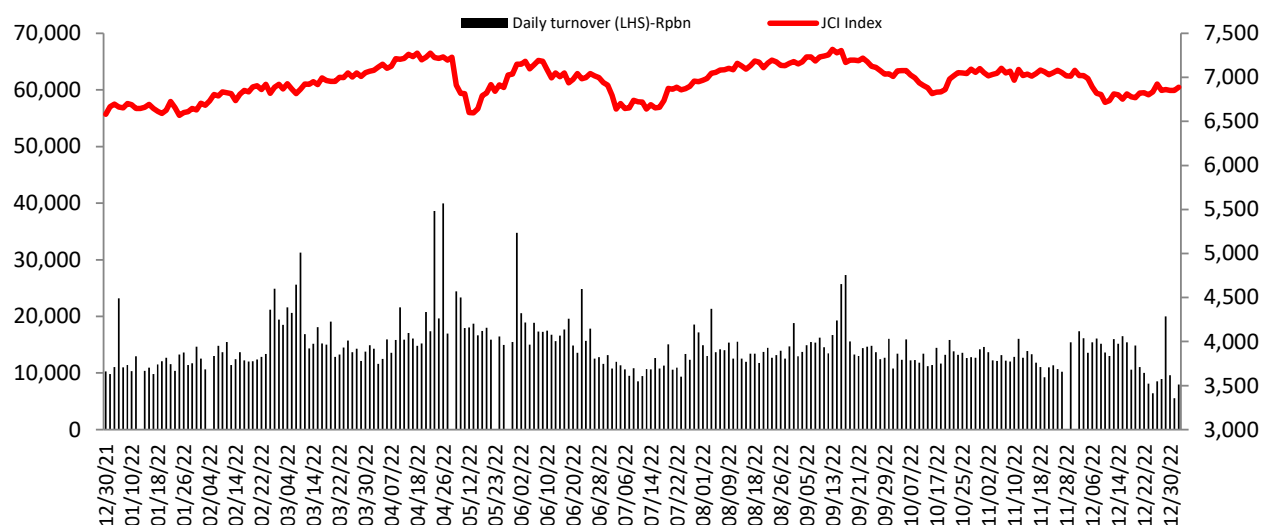
### BOND MARKET

#### 1st Auction in 2023

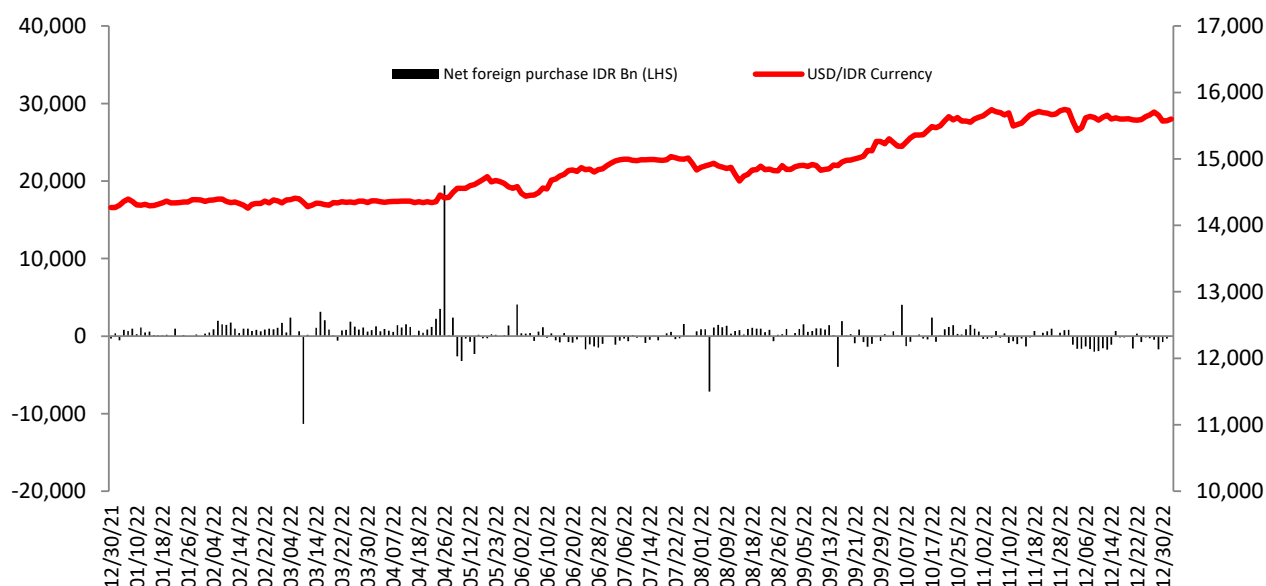
Indonesia bond market opened weaker ahead first auction today as market cautious on higher issuance target. Nothing much changed in today's trading activity despite Rupiah weakening traded above 15,600. In today auction, government received incoming bids totaling at IDR 28.315Tn, out of which MoF managed to issue IDR 23Tn as per initial target. Post the auction result, small trading was seen and IDR bonds yield closed higher 5 – 7 bps compared to yesterday closing. The series absorbed (against incoming bids) on the auction were IDR 1Tn (IDR 4.37Tn) 3mo SPN, IDR 2.5Tn (IDR 3.05Tn) 12mo SPN, IDR 3.65Tn (IDR 6.494Tn) 5Y FR95, IDR 8.1Tn (IDR 9.481Tn) 10Y FR96, IDR 2Tn (IDR 2.616Tn) 15Y FR98, IDR 1.15Tn (IDR 1.435Tn) 20Y FR97 and IDR 0.8Tn (IDR 0.869Tn) 30Y FR89 at weighted average yields of 4.49%, 5.44%, 6.62%, 7.03%, 7.12%, 7.16% and 7.26% respectively.

## 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	96.1	(0.1)	(0.1)	5Y
FR82	FR0082 Govt	95.6	(0.7)	(0.7)	10Y
FR80	FR0080 Govt	95.0	(1.7)	(1.4)	15Y
FR83	FR0083 Govt	100.1	(0.2)	(0.2)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,888.8	0.6	0.6	
Thailand	SET Index	1,681.8	0.8	0.8	
Korean Stock Exch.	KOSPI Index	2,218.7	(0.3)	(0.8)	
Straight Times	FSSTI Index	3,245.8	(0.2)	(0.2)	
Kuala Lumpur	KLCI Index	1,474.0	(1.4)	(1.4)	
Philippines	PCOMP Index	6,586.0	0.3	0.3	
Nikkei	NKY Index	26,094.5	0.0	0.0	
Hang Seng	HSI Index	20,145.3	1.8	1.8	
MSCI-Asia pacific	MXAP Index	155.8	0.0	0.0	
<u>Global Indices</u>					
Dow Jones	INDU Index	33,147.3	(0.2)	0.0	
S&P 500	SPX Index	3,839.5	(0.3)	0.0	
Nasdaq	CCMP Index	10,466.5	(0.1)	0.0	
FTSE 100	UKX Index	7,612.7	2.2	2.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,598.0	(0.2)	(0.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,570.0	(1.0)	(1.0)
3 month	IDSWT3M Index	15,574.8	(0.0)	0.0
6 month	IDSWT6M Index	15,580.0	(0.1)	0.0
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,572.2	0.0	(0.0)
6 month	IDFWT6M Index	15,643.7	(0.1)	0.0

\*price as of 12/31/2022


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