



FOR PROFESSIONAL INVESTORS - 07/31/2023

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### INCHED UP

JCI slightly strengthened and closed at 6,931 (+31 points or +0.45%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net outflow of IDR 1.5Tn today and rupiah was stabilized at IDR 15,080/USD.

Banking stocks were mixed as BMRI (+0.44%), MEGA (+3.38%), and BBTN (+1.15%) advanced, while BDMN (-3.16%) and BBRI (-0.88%) declined. Consumer names were mixed as KLBF (+0.26%) and KAEF (+1.8%) advanced, while MYOR (-0.41%), GGRM (-0.62%), and UNVR (-0.52%) down. Poultry stocks were mixed as CPIN (+4.33%) and JPFA (+4.3%) in green, while MAIN unchanged. Pulp & paper names were positive as INKP (+3.1%) and TKIM (+1.5%) all rose. Other movers were STTP (+11.21%), MDKA (+6.69%), ESSA (-9.92%), and INDY (-7.71%).

The ministry of Energy and Natural resources (ESDM) has implemented a tariff for EV charging stations, under the decision of ESDM no.182.K/TL.04/MEM.S/2023 on fees for electric charging station. For fast charging fees at most Rp25k and for ultrafast charging at most Rp57k, excluding value added tax (PPN)

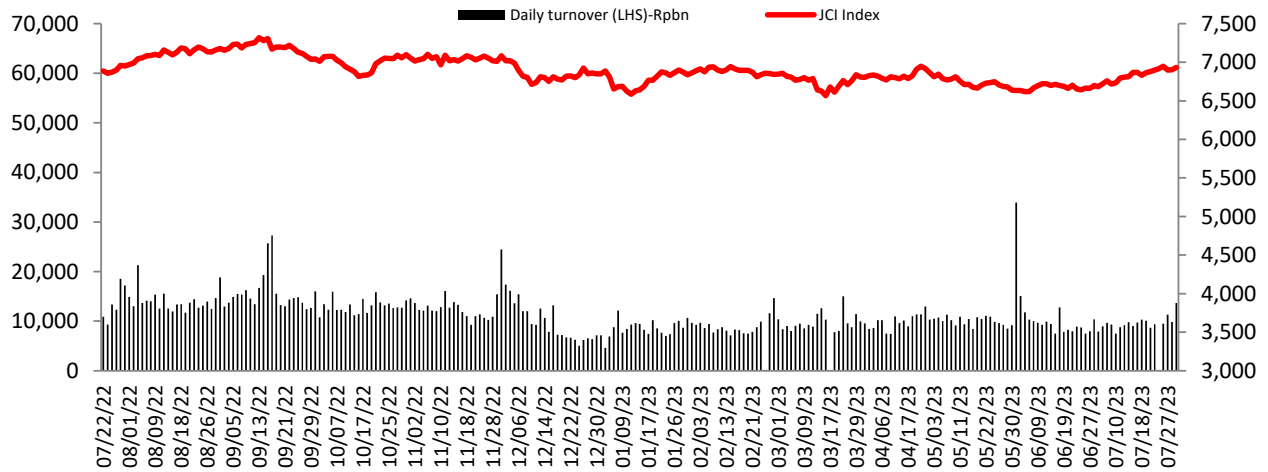
### BOND MARKET

#### CAUTIOUS TRADING

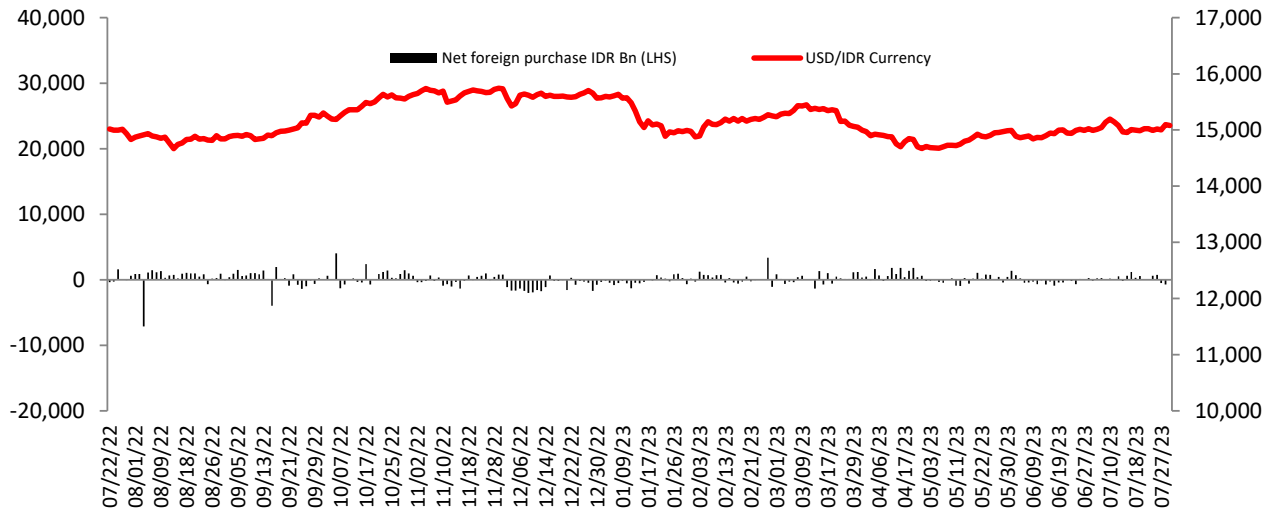
Indonesia bond market closed the month with better sentiment. Month end demand bringing the yield curve 2 – 5 bps lower than last friday closing. Several buying interest from onshore players was seen. The 10Y benchmarks series remained as market's favorite. Overall tone remains cautious and the yield of benchmark series closed the day at 5.95%/6.24%/6.41%/6.48%

# 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	97.8	0.1	1.6	5Y
FR82	FR0082 Govt	100.3	0.1	4.1	10Y
FR80	FR0080 Govt	100.2	0.2	3.4	15Y
FR83	FR0083 Govt	105.7	0.0	5.3	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,931.4	0.5	1.2	
Thailand	SET Index	1,555.2	0.8	(6.8)	
Korean Stock Exch.	KOSPI Index	2,632.6	0.9	17.7	
Straight Times	FSSTI Index	3,378.5	0.2	3.9	
Kuala Lumpur	KLCI Index	1,459.4	0.6	(2.4)	
Philippines	PCOMP Index	6,591.5	(0.5)	0.4	
Nikkei	NKY Index	33,172.2	1.3	27.1	
Hang Seng	HSI Index	20,078.9	0.8	1.5	
MSCI-Asia pacific	MXAP Index	170.0	0.4	9.2	
<u>Global Indices</u>					
Dow Jones	INDU Index	35,459.3	0.5	7.0	
S&P 500	SPX Index	4,582.2	1.0	19.3	
Nasdaq	CCMP Index	14,316.7	1.9	36.8	
FTSE 100	UKX Index	7,690.2	(0.1)	3.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,080.0	0.1	3.2
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,072.8	0.5	(4.1)
3 month	IDSWT3M Index	15,075.3	0.5	3.2
6 month	IDSWT6M Index	15,099.2	0.7	3.1
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,095.3	0.6	3.1
6 month	IDFWT6M Index	15,098.6	0.4	3.5
			(0.6)	

\*price as of 7/28/2023

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