



FOR PROFESSIONAL INVESTORS - 09/14/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

REBOUNDED

JCI advanced and closed at 6,129 (+41 points or +0.67%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 401Bn today and rupiah was stabilized at IDR 14,248/USD.

Banking stocks were mostly negative as BBTN (-1.74%), BDMN (-1.21%), BBKA (-0.15%), and BMRI (-0.81%) all closed lower, except MEGA (+1.62%). Consumer names were mostly positive as HMSP (+2.01%), KLBF (+0.68%), UNVR (+0.25%), and ICBP (+0.3%) all in green, except INDF (-0.8%). Telco stocks were positive as TLKM (+2.69%), EXCL (+8.86%), and ISAT (+3.72%) all rose. Properties names were positive as LPKR (+15%), PWON (+3.46%), BSDE (+2.06%), and CTRA (+1.04%) all advanced. Other movers were BSSR (+18.6%), BTPS (+6.11%), BABP (-5.68%), and SDRA (-5.63%).

Domestic car sales jumped 123% YoY to 83,319 units on Aug-21, compared to 37,277 units in the same month last year. This is supported by economic improvements and 100% PPnBM-DTP tax incentives.

BOND MARKET

AUCTION DAY

Bond market opened in wide spread today. Ahead of government bonds auction, we witnessed several sporadic activity especially on 5Y-10Y areas. After MoF released the incoming bids data which amounts to IDR 80.66Tn, price quotation went up by 10-15bps. Unabsorbed bidder turned to secondary market and the end of the day bond yield lower by 3 – 4 bps.

In today auction, MoF managed to issuance IDR 21Tn. The series absorbed (against incoming bids) on the auction were IDR 1Tn (IDR 7.05Tn) 3mo SPN, IDR 1.6Tn (IDR 7.995Tn) 12mo SPN, IDR 6.55Tn (IDR 21.691Tn) 5Y FR90, IDR 6.6Tn (IDR 18.715Tn) 10Y FR91, IDR 1.4Tn (IDR 5.651Tn) 15Y FR88, IDR 2.2Tn (IDR 15.35Tn) 20Y FR92 and IDR 1.65Tn (IDR 4.211Tn) 30Y FR89 at weighted average yields of 2.77%, 3.00%, 5.09%, 5.99%, 6.24%, 6.73% and 6.79% respectively.

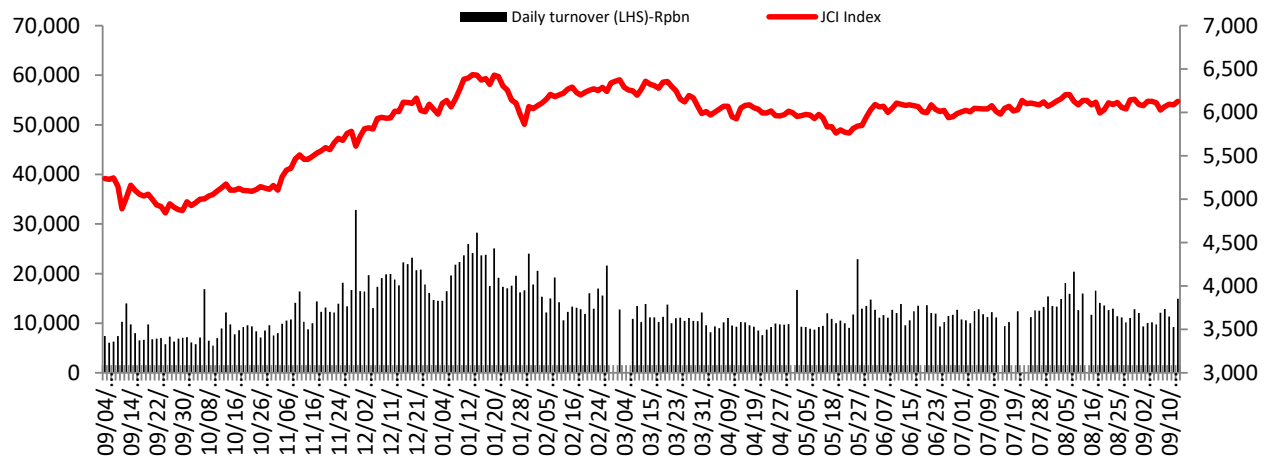


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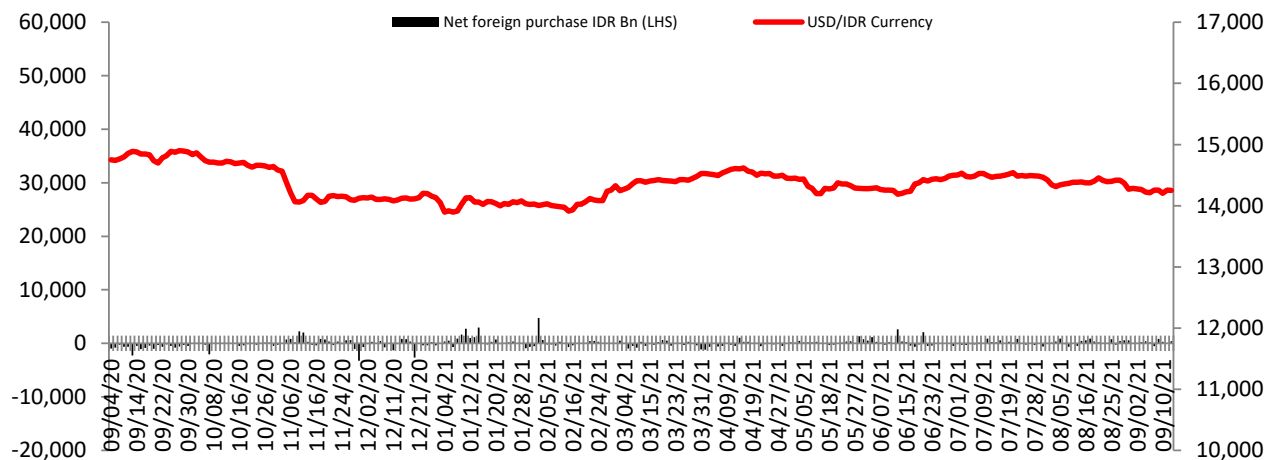
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GRAPHS & TABLES

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	101.9	0.1	0.2	5Y
FR82	FR0082 Govt	102.6	0.1	(2.1)	10Y
FR80	FR0080 Govt	99.9	0.1		15Y
FR83	FR0083 Govt	106.6	(0.1)	(3.8)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,129.1	0.7	2.5	
Thailand	SET Index	1,623.8	(0.6)	12.0	
Korean Stock Exch.	KOSPI Index	3,148.8	0.7	9.6	
Straight Times	FSSTI Index	3,080.4	0.2	8.3	
Kuala Lumpur	KLCI Index	1,555.5	(0.9)	(4.4)	
Philippines	PCOMP Index	6,920.4	(0.7)	(3.1)	
Nikkei	NKY Index	30,670.1	0.7	11.8	
Hang Seng	HSI Index	25,502.2	(1.2)	(6.3)	
MSCI-Asia pacific	MXAP Index	205.6	(0.5)	2.9	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,869.6	0.8	13.9	
S&P 500	SPX Index	4,468.7	0.2	19.0	
Nasdaq	CCMP Index	15,105.6	(0.1)	17.2	
FTSE 100	UKX Index	7,048.9	(0.3)	9.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,248.0	0.0	(1.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,254.1	0.2	1.2
3 month	IDSWT3M Index	14,258.3	0.3	(1.2)
6 month	IDSWT6M Index	14,255.7	0.3	(1.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,302.1	(0.1)	(1.0)
6 month	IDFWT6M Index	14,375.4	0.2	0.3

*price as of 9/13/2021


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* PT BNP Asset Management (address: Sequis Tower, 29th Floor, Jl. Jend. Sudirman Kav. 71, SCBD Lot 11B, Jakarta 12190 - INDONESIA).

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