

FOR PROFESSIONAL INVESTORS - 05/11/2021

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### RETREATED

JCI weakened and closed at 5,938 (-37 points or -0.63%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net outflow of IDR 60Bn today and rupiah was stabilized at IDR 14,198/USD.

Banking stocks were mostly negative as PNB (-1.1%), BBNI (-0.9%), BMRI (-1.26%), and BBRI (-1.48%) all closed lower, except BBKA (+0.93%). Consumer names were mostly negative as ICBP (-0.87%), KLBF (-1.7%), MYOR (-3.05%), and UNVR (-1.32%) all closed lower, except HMSP (+0.39%). Construction stocks were negative as PTPP (-1.94%), WIKA (-1.37%), ADHI (-5.06%), and WSKT (-2.26%) all closed lower. Material names were mixed as TPIA (-4.12%) retreated, while BRPT unchanged. Other movers were ISSP (+15%), HRUM (+12.39%), EMTK (-3.98%), and JPFA (-3.83%).

MoF is planning to increase the VAT tariff and still evaluating two VAT schemes through 1) maintains single VAT tariff or 2) enacting multiple VAT tariffs to different goods/services. This is done to ensure that state budget deficit will not

### BOND MARKET

#### FLAT TRADING DAY

It was slow day for the bond market with no supportive catalyst was seen. Overall market was relatively quiet throughout the day with small trade done in middle series. Market players were defensive and stay sidelined throughout the day ahead of Eid holiday. The benchmark series of 5, 10, 15 and 20Y closed at mid-yield of 5.53%, 6.41%, 6.24% and 7.12% respectively.

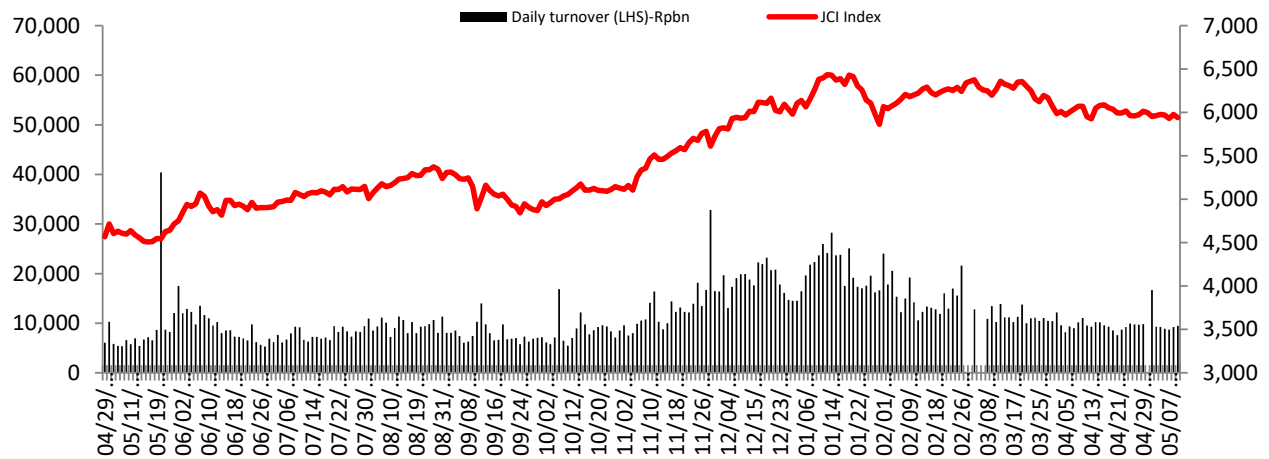


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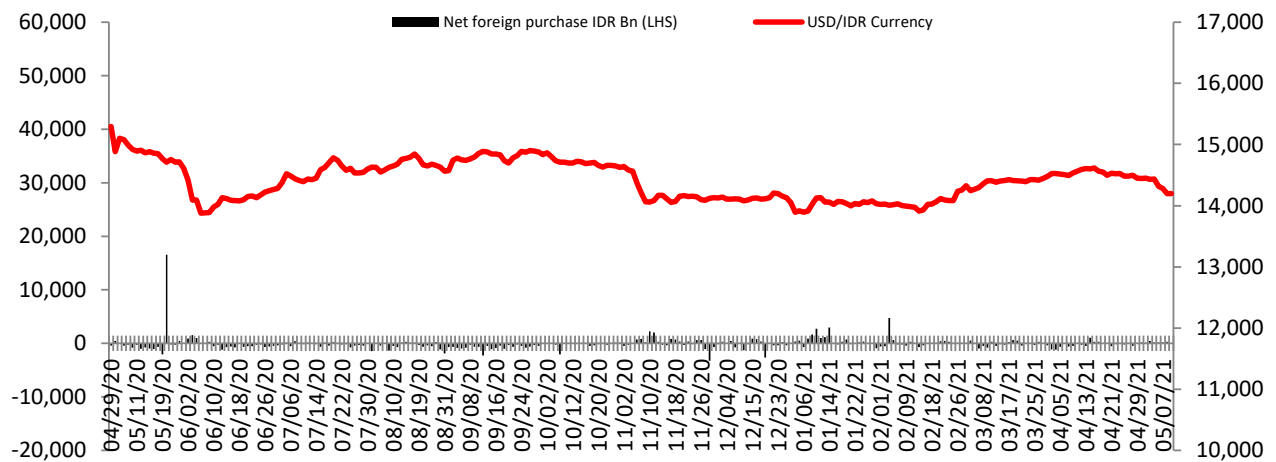
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## GRAPHS & TABLES

### JCI & DAILY TURNOVER



### IDR & NET FOREIGN PURCHASES



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## EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
<u>Bonds</u>					
FR81	FR0081 Govt	99.9	0.0	(1.8)	5Y
FR82	FR0082 Govt	100.6	(0.2)	(4.0)	10Y
FR80	FR0080 Govt	99.6	0.0		15Y
FR83	FR0083 Govt	103.9	(0.1)	(6.2)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	5,938.4	(0.6)	(0.7)	
Thailand	SET Index	1,578.9	(0.6)	8.9	
Korean Stock Exch.	KOSPI Index	3,209.4	(1.2)	11.7	
Straight Times	FSSTI Index	3,144.3	(1.2)	10.6	
Kuala Lumpur	KLCI Index	1,577.6	(0.4)	(3.0)	
Philippines	PCOMP Index	6,326.8	0.1	(11.4)	
Nikkei	NKY Index	28,608.6	(3.1)	4.2	
Hang Seng	HSI Index	28,013.8	(2.0)	2.9	
MSCI-Asia pacific	MXAP Index	208.2	0.3	4.2	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,742.8	(0.1)	13.5	
S&P 500	SPX Index	4,188.4	(1.0)	11.5	
Nasdaq	CCMP Index	13,401.9	(2.5)	4.0	
FTSE 100	UKX Index	6,954.7	(2.4)	7.6	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,198.0	0.0	(1.0)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,201.9	(1.5)	0.8
3 month	IDSWT3M Index	14,199.0	(0.7)	(0.7)
6 month	IDSWT6M Index	14,195.2	(0.6)	(0.7)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,231.2	(0.7)	(0.5)
6 month	IDFWT6M Index	14,311.1	(0.7)	0.7
				(0.0)

\*price as of 5/10/2021


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