



FOR PROFESSIONAL INVESTORS - 03/04/2021

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### CORRECTED

JCI weakened and closed at 6,291 (-86 points or -1.35%) today. Shares across regional markets were negative. Meanwhile, foreign investors recorded net outflow of IDR 18Bn today and rupiah slightly weakened to IDR 14,267/USD.

Banking stocks were negative as MEGA (-1.72%), PNB (-4.55%), BMRI (-0.76%), BBRI (-1.86%), and BBKA (-4%) all down. Consumer names were mostly negative as INDF (-1.59%), KAEF (-5.41%), ICBP (-1.43%), and UNVR (-2.18%) all closed lower, except HMSP (+4.27%). Mining stocks were mostly negative as ITMG (-0.21%), TINS (-6.9%), INCO (-6.75%), and ANTM (-6.67%) all retreated, except ADRO (+2.95%). Infra names were negative as JSMR (-1.45%), TBIG (-1.38%), PGAS (-2.73%), and TOWR (-4.35%) all weakened. Other movers were DWGL (+34.23%), BOLT (+25%), MIKA (-4.78%), and BRPT (-3.76%).

President Jokowi has revoked Appendix III of Presidential Decree 10/2021 which regulates investment in the alcoholic beverage industry is only allowed in the Provinces of Bali, NTT, North Sulawesi and Papua.

### BOND MARKET

#### QUIET MARKET

Indonesia bond market was calm today. Only few trades were seen throughout the day with light trading volume. Although the overall market tone was mixed, no significant price action took place. IDR bond the prices ended the day unchanged from yesterday level. The yield of 5/10/15/20Y benchmark closed the day at mid-yield of 5.63%/6.55%/6.33%/7.21% respectively.

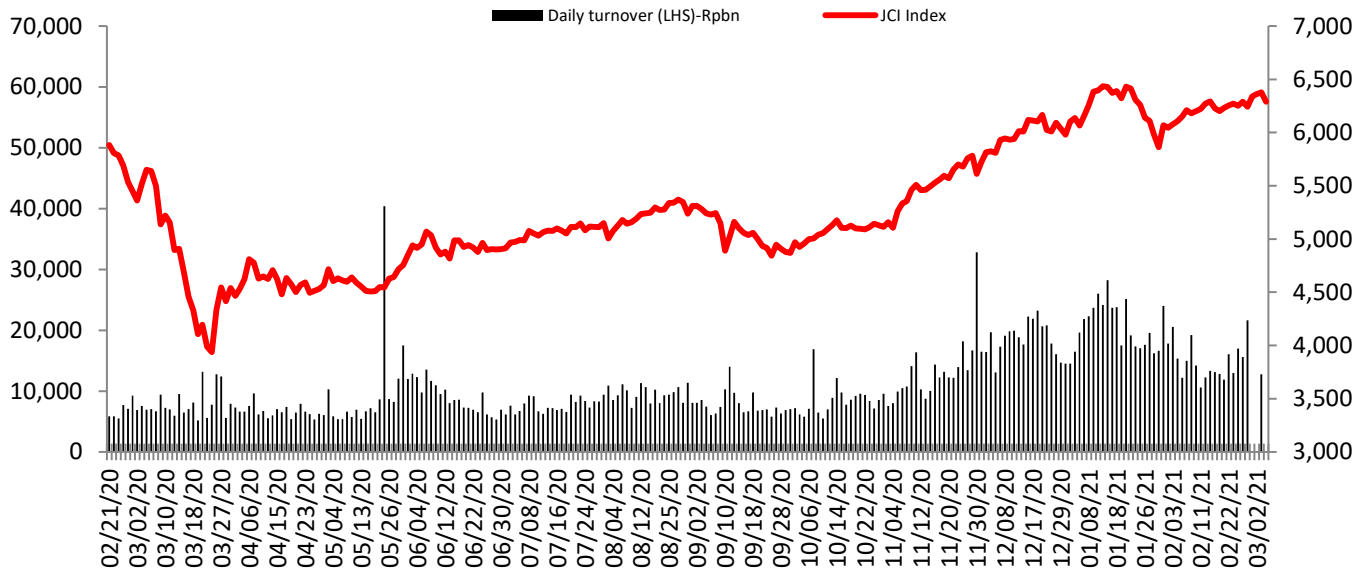


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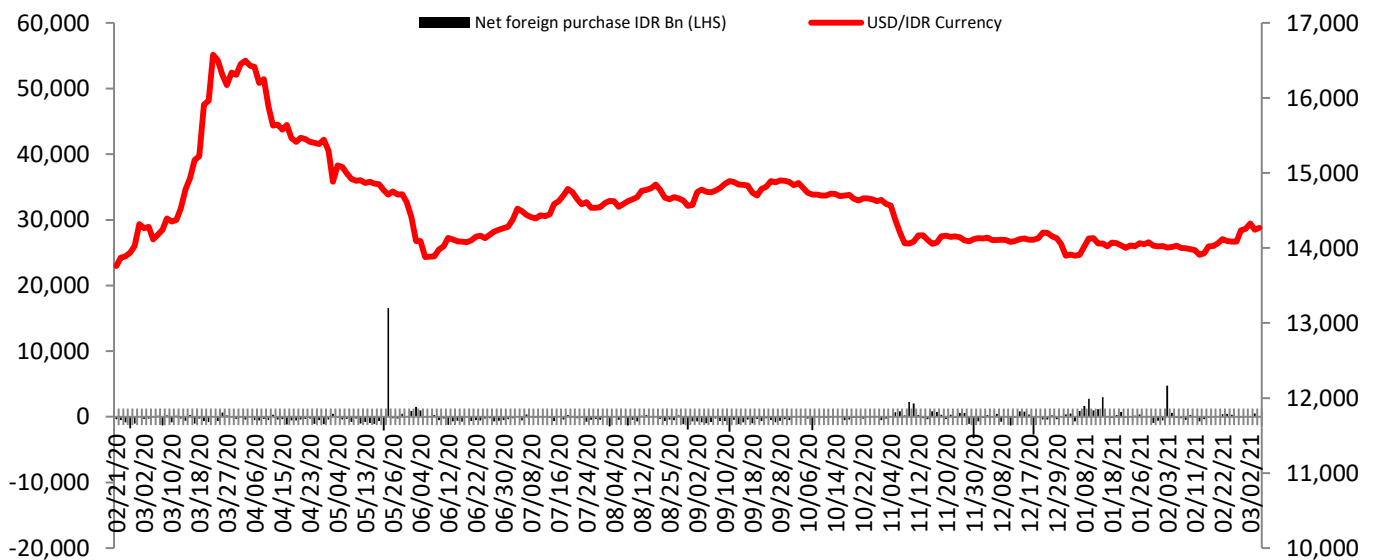
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## GRAPHS & TABLES

### 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	99.4	(0.1)	(2.2)	5Y
FR82	FR0082 Govt	99.6	(0.3)	(4.9)	10Y
FR80	FR0080 Govt	99.1	(0.1)		15Y
FR83	FR0083 Govt	102.9	(0.2)	(7.1)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,290.8	(1.3)	5.2	
Thailand	SET Index	1,534.1	(0.6)	5.8	
Korean Stock Exch.	KOSPI Index	3,043.5	(1.3)	5.9	
Straight Times	FSSTI Index	3,014.8	0.5	6.0	
Kuala Lumpur	KLCI Index	1,581.3	(0.5)	(2.8)	
Philippines	PCOMP Index	6,882.5	(0.9)	(3.6)	
Nikkei	NKY Index	28,930.1	(2.1)	5.4	
Hang Seng	HSI Index	29,236.8	(2.2)	7.4	
MSCI-Asia pacific	MXAP Index	211.9	1.1	6.0	
<u>Global Indices</u>					
Dow Jones	INDU Index	31,270.1	(0.4)	2.2	
S&P 500	SPX Index	3,819.7	(1.3)	1.7	
Nasdaq	CCMP Index	12,997.8	(2.7)	0.8	
FTSE 100	UKX Index	6,613.4	(0.9)	2.4	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,267.0	(0.2)	(1.5)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,306.9	(0.2)	1.5
3 month	IDSWT3M Index	14,281.4	(0.5)	(1.3)
6 month	IDSWT6M Index	14,315.0	(0.3)	(1.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,358.9	0.1	(1.4)
6 month	IDFWT6M Index	14,437.7	(0.5)	(0.2)
				(1.8)

\*price as of 3/3/2021



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