



FOR PROFESSIONAL INVESTORS - 11/27/2020

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

RALLYING

JCI continued its uptrend and closed at 5,783 (+23 points or +0.41%) today supported by local buying. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR -1.1Tn today and rupiah was stabilized at IDR 14,090/USD.

Banking stocks were mixed as BDMN (+3.83%) and BBNI (+0.79%) advanced, while BBRI (-0.47%), BMRI (-1.12%), and BBCA (-1.47%) down. Consumer names were mixed as ICBP (+4.69%), HMSP (+0.95%), and INDF (+1.04%) inched higher, while SIDO (-1.26%) and KLBF (-0.67%) retreated. Infra stocks were positive as TOWR (+4.65%), TBIG (+5.96%), PGAS (+4.2%), and JSMR (+0.46%) all closed higher. Construction names were positive as WIKA (+6.94%), WSKT (+5.21%), PTPP (+6.06%), and ADHI (+4.46%) all in green. Other movers were BYAN (+7.64%), AALI (+7.37%), BUMI (-6.58%), and SSMS (-4.76%).

Transportation Ministry to review the maximum airlines passenger capacity from currently at 70% capacity. According to the Minister there is a possibility to relax the maximum capacity up to 85% of capacity to support airlines recovery.

BOND MARKET

QUIET

The bond market ended slightly lower as sentiment remained mixed today. Overall market was relatively quiet throughout the day with small trades on benchmark series. There is not much activity both from local and foreign as most players prepared for auction next week. The most traded bond today was 11Y FR87 and 10Y FR82 which was seen traded at 102.95 (6.1%) and 106 (6.17%) respectively.

Next week, Indonesia Debt Management Office ("DMO") will hold its last conventional bond auction of the year with IDR 20tn target of issuance comprising of 3mo SPN, 12mo SPN, 6Y FR86, 11Y FR87, 15Y FR80, 20Y FR83 and 30Y FR76.

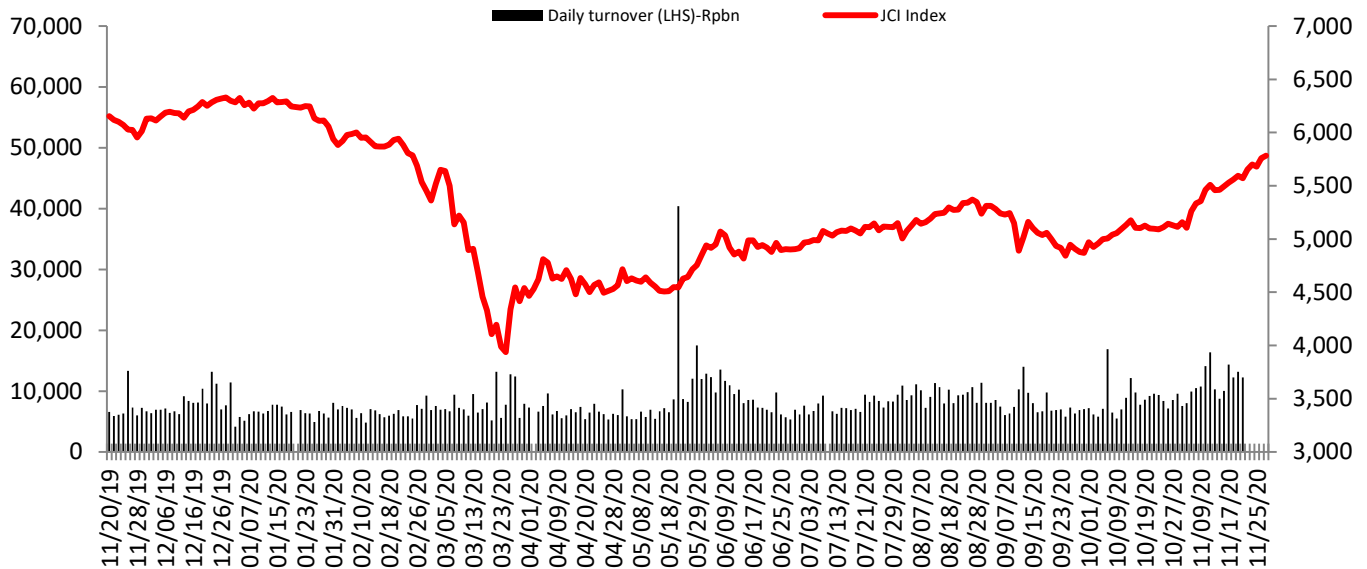


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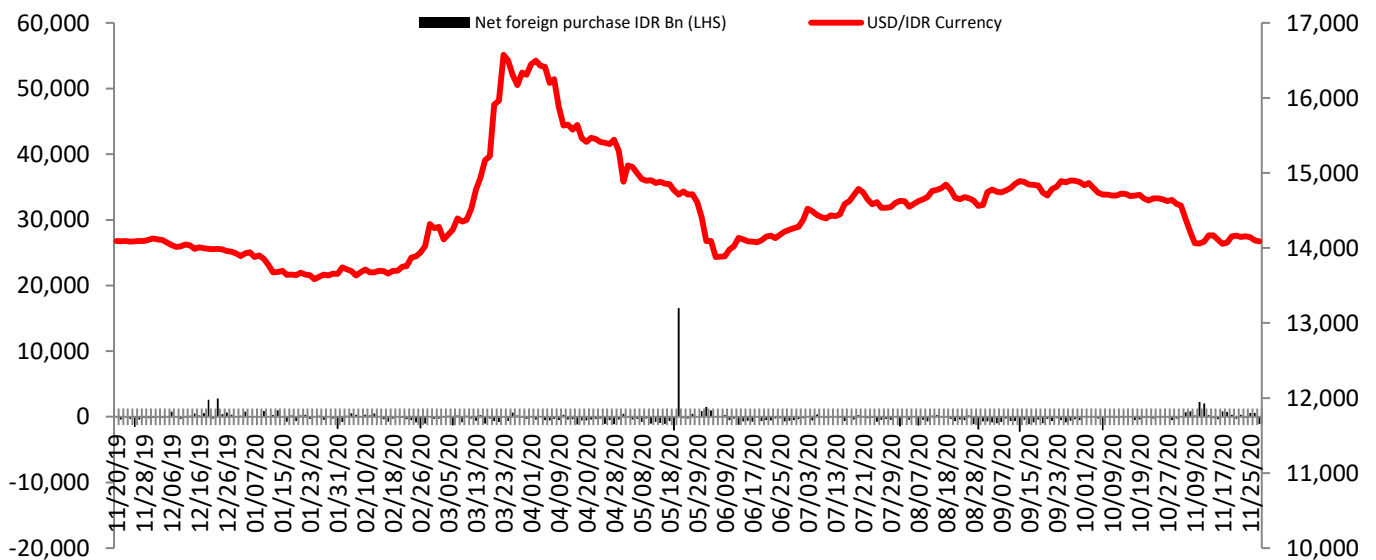
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GRAPHS & TABLES

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	105.8	(0.0)	5.2	5Y
FR82	FR0082 Govt	106.0	(0.1)	6.5	10Y
FR80	FR0080 Govt	107.7	(0.1)	7.3	15Y
FR83	FR0083 Govt	106.3	(0.1)	6.8	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	5,783.3	0.4	(8.2)	
Thailand	SET Index	1,437.7	0.3	(9.0)	
Korean Stock Exch.	KOSPI Index	2,633.5	0.3	19.8	
Straight Times	FSSTI Index	2,861.7	0.1	(11.2)	
Kuala Lumpur	KLCI Index	1,607.6	(0.3)	1.2	
Philippines	PCOMP Index	6,791.5	(2.0)	(13.1)	
Nikkei	NKY Index	26,644.7	0.4	12.6	
Hang Seng	HSI Index	26,894.7	0.3	(4.6)	
MSCI-Asia pacific	MXAP Index	192.5	0.7	12.8	
<u>Global Indices</u>					
Dow Jones	INDU Index	29,872.5	(0.6)	4.7	
S&P 500	SPX Index	3,629.7	(0.2)	12.3	
Nasdaq	CCMP Index	12,094.4	0.5	34.8	
FTSE 100	UKX Index	6,332.9	(0.5)	(16.0)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,090.0	0.1	(1.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,130.0	(0.3)	1.1
3 month	IDSWT3M Index	14,127.9	(0.3)	(1.9)
6 month	IDSWT6M Index	14,130.0	(0.6)	(1.9)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,221.3	0.3	(2.0)
6 month	IDFWT6M Index	14,327.0	(0.1)	(1.0)

*price as of 11/26/2020



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