



FOR PROFESSIONAL INVESTORS - 08/10/2023

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Flat

JCI was flat and closed at 6,875 (+6 points or +0.09%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 816Bn today and rupiah slightly strengthened to IDR 15,191/USD.

Banking stocks were mixed as BBKA (+2.17%), BBRI (+1.33%), and BBNI (+1.68%) inched higher, while PNBK (-1.44%) and MEGA (-1.44%) declined. Consumer names were mostly negative as INDF (-0.36%), ICBP (-0.45%), GGRM (-1.96%), and UNVR (-0.8%) all closed lower, except KLBF (+1.08%). Poultry stocks were positive as CPIN (+3.41%), JPFA (+5.79%), and MAIN (+0.83%) all rose. Telco names were mixed as TLKM (+1.07%) and ISAT (+3.89%) up, while FREN (-3.51%) closed lower. Other movers were AMRT (+2.52%), INTP (+2.33%), MPRO (-8.28%), and MNCN (-6.31%).

As of early August 2023, non-tax state revenue from the mineral and coal mining sector reached Rp111.65tn. This figure has reached 131% of the target (Rp85.2tn).

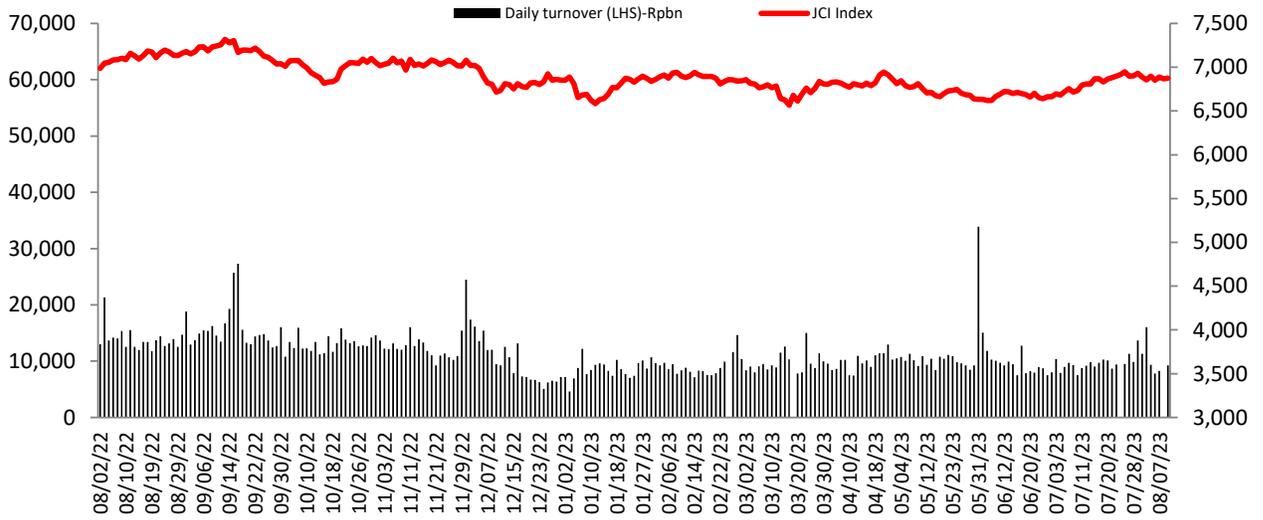
### BOND MARKET

#### QUIET MARKET

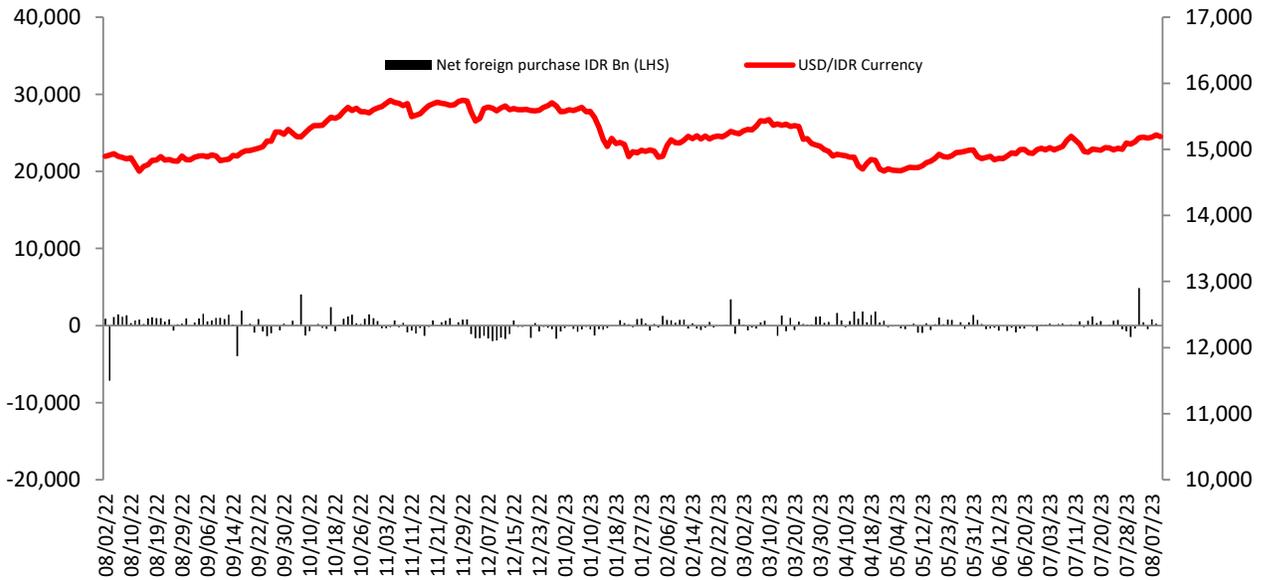
Indonesia bond market was calm today with SG market on holiday. Only few trades were seen throughout the day with light trading volume especially in the front end. Although the overall market tone was mixed, no significant price action took place. IDR bond the prices ended the day unchanged from yesterday level. The yield of 5/10/15/20Y benchmark closed the day at mid-yield of 6.02%/6.31%/6.47%/6.57% respectively.

# 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>          |                     |          |            |            |            |
| FR90                  | FR0090 Govt         | 97.5     | (0.2)      | 1.3        | 5Y         |
| FR91                  | FR0091 Govt         | 100.2    | 0.0        | 4.0        | 10Y        |
| FR93                  | FR0093 Govt         | 100.3    | 0.0        | 3.6        | 15Y        |
| FR92                  | FR0092 Govt         | 105.1    | 0.1        | 4.8        | 20Y        |
| PBS036                | INDOIS 5 ¼ 08/15/25 | 98.9     | (0.0)      | 1.3        | 15-8-2025  |
| PBS003                | INDOIS 6 01/15/27   | 100.6    | 0.0        | 2.3        | 15-01-2027 |
| PBS037                | INDOIS 6 ¾ 03/15/36 | 103.6    | (0.0)      |            | 15-03-2036 |
| PBS033                | INDOIS 6 ¾ 06/15/47 | 100.9    | (0.1)      | 7.3        | 15-06-2047 |
| <u>Asia Pacific</u>   |                     |          |            |            |            |
| Jakarta Composite     | JCI Index           | 6,875.1  | 0.1        | 0.4        |            |
| Thailand              | SET Index           | 1,526.1  | 0.5        | (8.5)      |            |
| Korean Stock Exch.    | KOSPI Index         | 2,605.1  | 1.2        | 16.5       |            |
| Straight Times        | FSSTI Index         | 3,313.8  | 0.1        | 1.9        |            |
| Kuala Lumpur          | KLCI Index          | 1,462.0  | 0.8        | (2.2)      |            |
| Philippines           | PCOMP Index         | 6,530.5  | 0.9        | (0.5)      |            |
| Nikkei                | NKY Index           | 32,204.3 | (0.5)      | 23.4       |            |
| Hang Seng             | HSI Index           | 19,246.0 | 0.3        | (2.7)      |            |
| MSCI-Asia pacific     | MXAP Index          | 164.9    | (0.9)      | 5.9        |            |
| <u>Global Indices</u> |                     |          |            |            |            |
| Dow Jones             | INDU Index          | 35,314.5 | (0.4)      | 6.5        |            |
| S&P 500               | SPX Index           | 4,499.4  | (0.4)      | 17.2       |            |
| Nasdaq                | CCMP Index          | 13,884.3 | (0.8)      | 32.7       |            |
| FTSE 100              | UKX Index           | 7,591.4  | 0.8        | 1.9        |            |

|                    | Bloomberg Code | IDR      | % Chg. D-D | % Chg. YTD |
|--------------------|----------------|----------|------------|------------|
| Spot IDR           | IDR Currency   | 15,191.0 | 0.2        | 2.5        |
| <u>Swap-IDR</u>    |                |          |            |            |
| 1 month            | IDSWT1M Index  | 15,208.0 | 0.3        | (3.3)      |
| 3 month            | IDSWT3M Index  | 15,225.7 | 0.3        | 2.3        |
| 6 month            | IDSWT6M Index  | 15,230.5 | 0.3        | 2.2        |
| <u>Forward-IDR</u> |                |          |            |            |
| 3 month            | IDFWT3M Index  | 15,235.4 | 0.3        | 2.2        |
| 6 month            | IDFWT6M Index  | 15,260.0 | 0.5        | 2.5        |

\*price as of 8/8/2023

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