

FOR PROFESSIONAL INVESTORS - 08/17/2023

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Lower

JCI slightly weakened and closed at 6,901 (-15 points or -0.21%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net outflow of IDR -1.34Tn today and rupiah slightly strengthened to IDR 15,283/USD.

Banking stocks were mixed as MEGA (+0.49%) inched higher, BNL (-0.52%), BDMN (-0.33%), and BBRI (-0.9%) corrected, and BBCA unchanged. Consumer names were positive as ICBP (+1.74%), INDF (+1.43%), KLBF (+1.08%), GGRM (+2.52%), and HMSP (+1.69%) all inched higher. Pulp & paper stocks were negative as TKIM (-2.16%) and INKP (-3.23%) all down. Telco names were positive as TLKM (+0.26%), EXCL (+3.07%), and ISAT (+1.56%) all advanced. Other movers were BBHI (+5.56%), ARTO (+2.33%), STTP (-7.5%), and SMSM (-4.11%).

Indonesia's trade balance surplus as of July 2023 dropped to USD1.31b from USD3.45b in June 2023. The surplus was attributed to non-oil and gas trades that booked at USD3.22b with total export worth at USD19.65b.

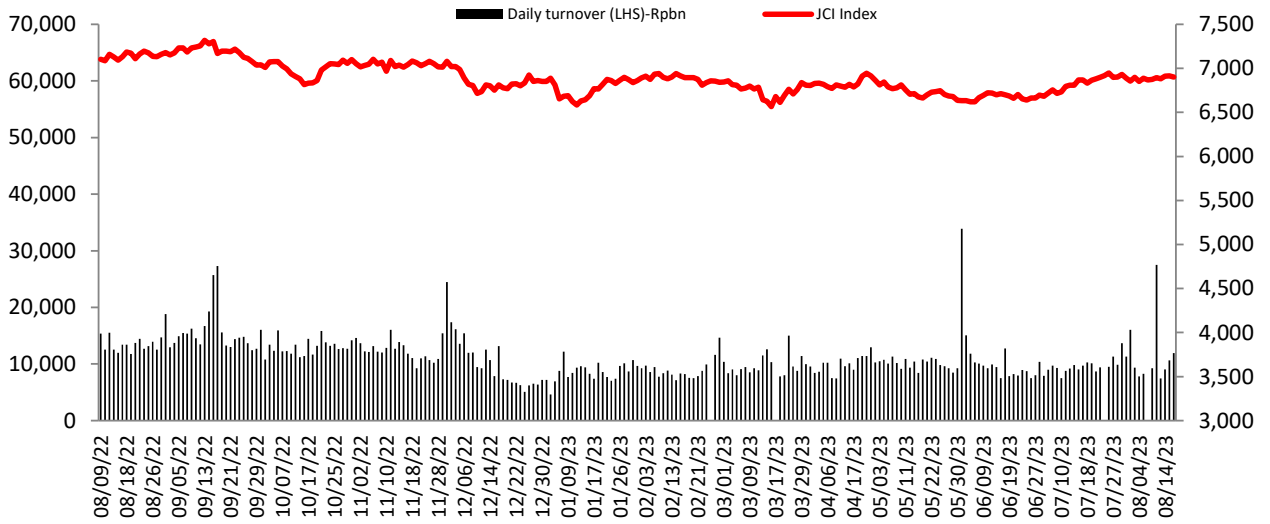
BOND MARKET

TWO WAY INTEREST

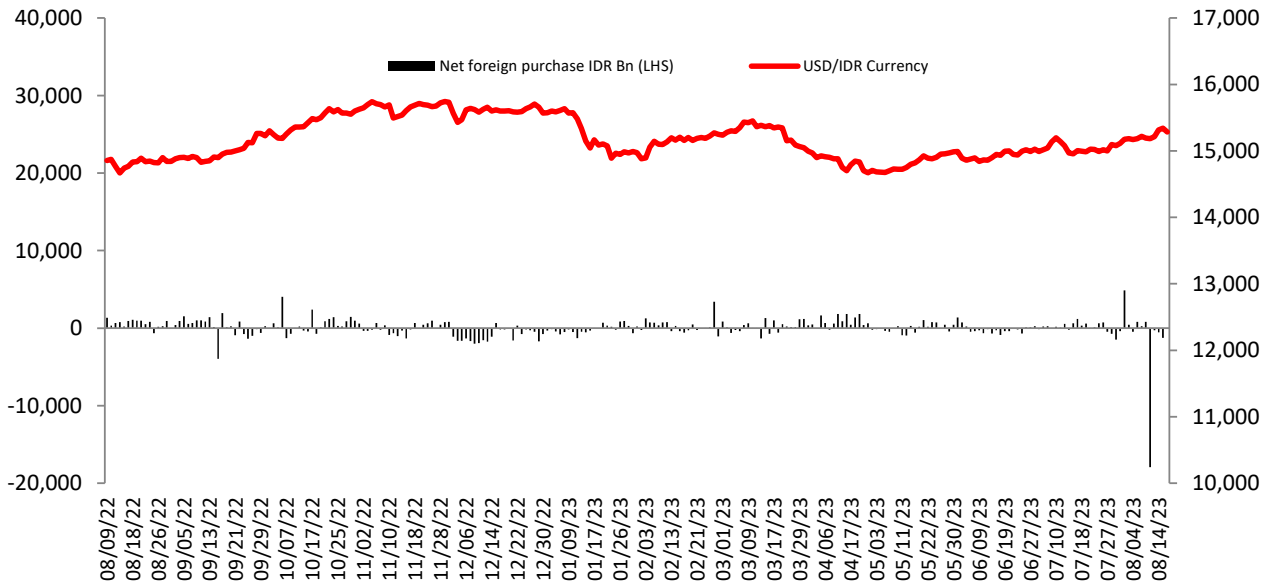
The mixed sentiment was seen in the bond market today with the bond price opened around the same level as yesterday's closing. Market saw mixed flow during the day as investor interest focused on belly series. Prices moved in tight range with overall bullish market tone was dominated by onshore names while offshore names tried to book profit. The 5Y/10Y yield higher by about 3 – 5bps compared to yesterday closing, while the rest of the curved moved up by 2 - 4 bps. Tomorrow INDOGBs market will be closed due to independence day holiday.

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	97.2	(0.1)	1.0	5Y
FR91	FR0091 Govt	99.9	(0.2)	3.7	10Y
FR93	FR0093 Govt	99.9	#VALUE!	3.7	15Y
FR92	FR0092 Govt	104.7	(0.0)	4.4	20Y
PBS036	INDOIS 5 ¾ 08/15/25	98.8	(0.0)	1.3	15-8-2025
PBS003	INDOIS 6 01/15/27	100.4	(0.0)	2.2	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	103.5	0.0		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	101.0	0.0	7.4	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,900.5	(0.2)	0.7	
Thailand	SET Index	1,518.4	(0.2)	(9.0)	
Korean Stock Exch.	KOSPI Index	2,525.6	(1.8)	12.9	
Straight Times	FSSTI Index	3,206.6	(0.8)	(1.4)	
Kuala Lumpur	KLCI Index	1,463.5	0.2	(2.1)	
Philippines	PCOMP Index	6,410.1	1.2	(2.4)	
Nikkei	NKY Index	31,766.8	(1.5)	21.7	
Hang Seng	HSI Index	18,329.3	(1.4)	(7.3)	
MSCI-Asia pacific	MXAP Index	161.5	(0.0)	3.7	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,946.4	(1.0)	5.4	
S&P 500	SPX Index	4,437.9	(1.2)	15.6	
Nasdaq	CCMP Index	13,631.1	(1.1)	30.2	
FTSE 100	UKX Index	7,378.6	(0.1)	(1.0)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,283.0	0.4	1.9
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,225.0	0.2	(3.2)
3 month	IDSWT3M Index	15,341.2	0.1	1.5
6 month	IDSWT6M Index	15,342.5	0.1	1.5
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,351.0	0.1	1.4
6 month	IDFWT6M Index	15,360.3	(0.2)	1.8

*price as of 8/15/2023

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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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