



FOR PROFESSIONAL INVESTORS - 10/19/2021

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### FLATTISH

JCI was flat and closed at 6,656 (-3 points or -0.04%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 514Bn today and rupiah slightly strengthened to IDR 14,076/USD.

Banking stocks were mixed as BBNI (+2.12%) and BMRI (+0.35%) advanced, while MEGA (-1.16%), BBRI (-0.23%), and BBCA (-0.33%) declined. Consumer names were mixed as SIDO (+8.18%) and UNVR (+0.49%) closed higher, while KAEF (-5.06%), MYOR (-2.33%), and HMSP (-1.74%) corrected. Material stocks were positive as BRPT (+2.62%) and TPIA (+0.69%) all up. Pulp & paper names were negative as TKIM (-1.69%) and INKP (-1.91%) all declined. Other movers were IBST (+13.97%), BMAS (+10.34%), LIFE (-6.69%), and UNTR (-2.47%).

The value of automotive exports until the end of 3Q21 reached US\$6.35bn or around Rp89.44tn, surged by 43.35% YoY. These commodity exports contributed 4% of Indonesia's total non-oil and gas exports during 9M21.

### BOND MARKET

#### SUKUK DAY & BI STAYED AT 3.5%

Indonesia bond market closed the day with lower yield around 3 – 5 bps today. In the morning session, we heard mixed players came to secondary to collect some short to middle tenors following 10Y UST touched 1.57% and local currency traded below 14,100 level. While in the afternoon session market completely quiet especially after Bank Indonesia announced that the central bank keep 7-days repo rate unchanged at 3.5% as expected.

In today sukuk auction, MoF received a total of IDR 53.42Tn incoming bids. The series absorbed (against incoming bids) on the auction were IDR 0.8Tn (IDR 9.01Tn) 6mo SPNS, IDR 1.4Tn (IDR 10.56Tn) 3Y PBS31, IDR 1.2Tn (IDR 7.42Tn) 5Y PBS32, IDR 1.1Tn (IDR 14.47Tn) 13Y PBS29 and IDR 0.5Tn (IDR 11.95Tn) 25Y PBS28 at cut off yields of 2.76%, 4.09%, 4.85%, 6.3% and 6.92% respectively.

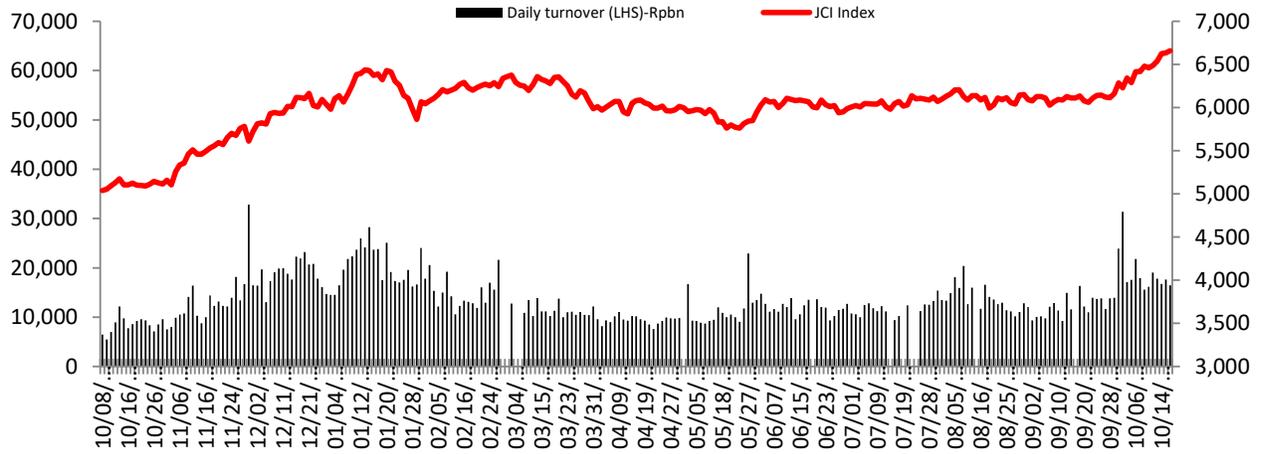


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**ASSET MANAGEMENT**

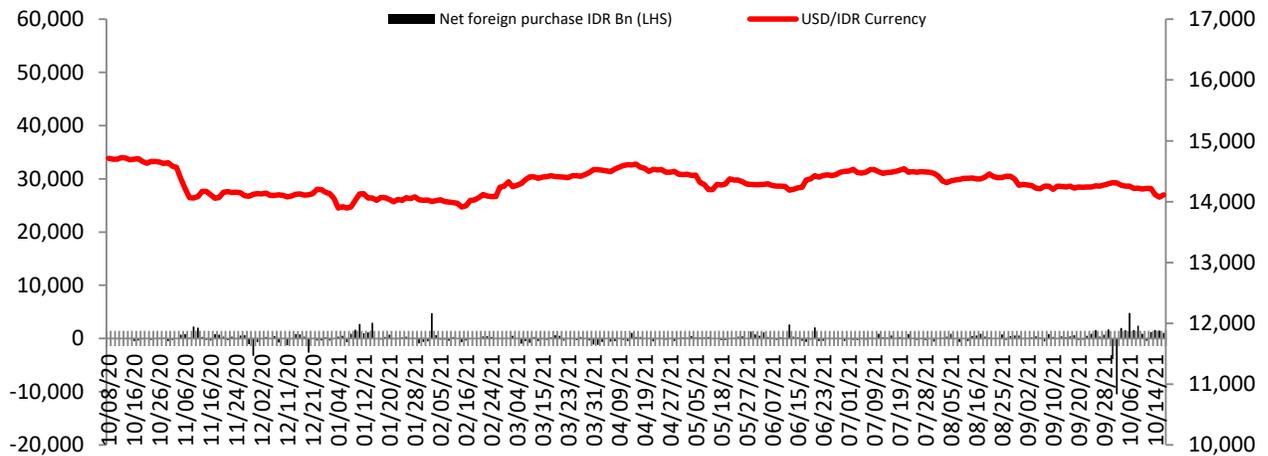
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# GRAPHS & TABLES

## 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	101.7	0.0	0.0	5Y
FR82	FR0082 Govt	102.4	0.3	(2.3)	10Y
FR80	FR0080 Govt	99.6	0.1		15Y
FR83	FR0083 Govt	104.1	0.1	(6.0)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,656.0	(0.0)	11.3	
Thailand	SET Index	1,630.4	(0.8)	12.5	
Korean Stock Exch.	KOSPI Index	3,029.0	0.7	5.4	
Straight Times	FSSTI Index	3,199.0	0.8	12.5	
Kuala Lumpur	KLCI Index	1,606.0	0.5	(1.3)	
Philippines	PCOMP Index	7,266.3	0.6	1.8	
Nikkei	NKY Index	29,215.5	0.7	6.5	
Hang Seng	HSI Index	25,787.2	1.5	(5.3)	
MSCI-Asia pacific	MXAP Index	198.3	(0.1)	(0.8)	
<u>Global Indices</u>					
Dow Jones	INDU Index	35,258.6	(0.1)	15.2	
S&P 500	SPX Index	4,486.5	0.3	19.4	
Nasdaq	CCMP Index	15,021.8	0.8	16.6	
FTSE 100	UKX Index	7,207.6	0.1	11.6	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,076.0	0.2	(0.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,080.0	(0.5)	(0.1)
3 month	IDSWT3M Index	14,082.5	(0.5)	0.1
6 month	IDSWT6M Index	14,086.0	(0.2)	0.1
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,212.0	(0.0)	(0.4)
6 month	IDFWT6M Index	14,350.0	0.0	0.5

\*price as of 10/18/2021

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