



FOR PROFESSIONAL INVESTORS - 01/27/2023

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### INCHED UP

JCI slightly strengthened and closed at 6,899 (+34 points or +0.5%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 919Bn today and rupiah slightly weakened to IDR 14,985/USD.

Banking stocks were mostly positive as BBKA (+2.65%), BMRI (+2.04%), BBRI (+1.09%), and BBNI (+0.79%) all closed higher, except MEGA (-0.45%). Consumer names were mostly negative as MYOR (-1.23%), GGRM (-1.68%), ICBP (-0.74%), and UNVR (-1.04%) all declined, except KLBF (+0.49%). Properties stocks were positive as CTRA (+3.74%), SMRA (+4.27%), BSDE (+2.72%), and PWON (+1.35%) all inched higher. Construction names were positive as WSKT (+9.55%), PTPP (+6.11%), ADHI (+5.19%), and WIKA (+2.94%) all closed higher. Other movers were ITMG (+2.78%), PTBA (+2.36%), ARTO (-6.98%), and BRMS (-4.66%).

The manufacturing industry recorded a total investment of Rp497.7tn in 2022, increased by +52% YoY. The biggest investment was on metal industry, food and beverages, chemical, and pharmaceutical.

### BOND MARKET

#### SELLING CONTINUES

IndoGB market traded lower today with overall yield curve closed higher by 3bps. The morning session saw a quiet market despite higher UST yields overnight following US better than expected 4Q GDP data release. However, selling interest were seen in the afternoon session mostly in 5-10Y tenor bucket. The most traded bonds today 10Y FR96 were traded as low as 101.85 (6.74%) while 11Y FR68 were traded as low as 111.8 (6.84%). By end of the day, the benchmark series of 5/10/15/20Y closed the week at mid yield 6.42%/6.74%/6.86%/6.90%

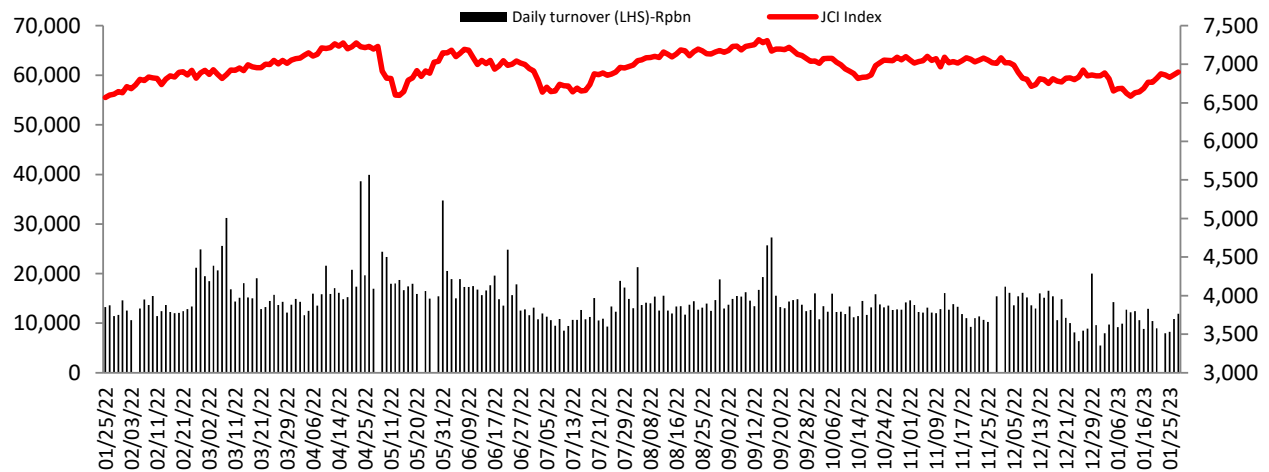


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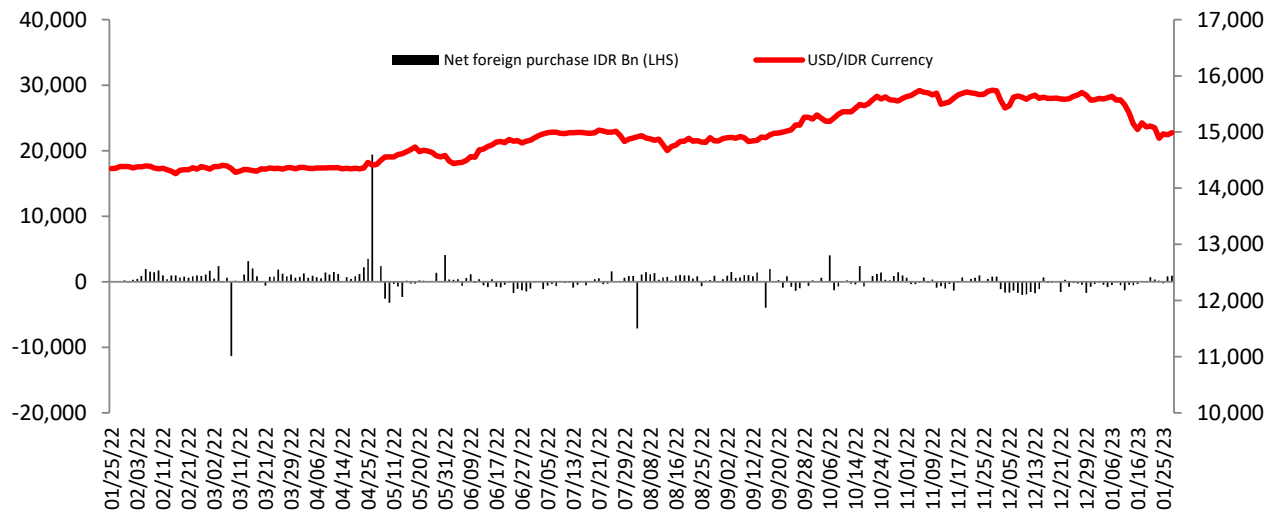
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## GRAPHS & TABLES

### 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	96.3	(0.0)	0.1	5Y
FR82	FR0082 Govt	98.1	(0.2)	1.9	10Y
FR80	FR0080 Govt	98.8	(0.2)	2.5	15Y
FR83	FR0083 Govt	102.1	(0.2)	1.8	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,899.0	0.5	0.7	
Thailand	SET Index	1,681.3	0.6	0.8	
Korean Stock Exch.	KOSPI Index	2,484.0	0.6	11.1	
Straight Times	FSSTI Index	3,394.2	0.5	4.4	
Kuala Lumpur	KLCI Index	1,497.6	(0.1)	0.1	
Philippines	PCOMP Index	7,052.2	0.1	7.4	
Nikkei	NKY Index	27,382.6	0.1	4.9	
Hang Seng	HSI Index	22,688.9	0.5	14.7	
MSCI-Asia pacific	MXAP Index	170.1	0.5	9.2	
<u>Global Indices</u>					
Dow Jones	INDU Index	33,949.4	0.6	2.4	
S&P 500	SPX Index	4,060.4	1.1	5.8	
Nasdaq	CCMP Index	11,512.4	1.8	10.0	
FTSE 100	UKX Index	7,764.8	0.0	4.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,985.0	(0.2)	3.9
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,951.5	(0.0)	(4.9)
3 month	IDSWT3M Index	14,942.8	(0.1)	4.1
6 month	IDSWT6M Index	14,945.0	(0.1)	4.1
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,968.0	0.0	3.9
6 month	IDFWT6M Index	14,963.7	(0.2)	4.4

\*price as of 1/27/2023


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