



FOR PROFESSIONAL INVESTORS - 10/01/2020

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### REBOUNDED

JCI advanced and closed at intraday high 4,970 (+100 points or +2.05%) today. Shares across regional markets were mostly positive with China, Hong Kong, Taiwan, and South Korea closed for holidays, while Tokyo Stock Exchange halted trading for the entire day due to a hardware breakdown. Meanwhile, foreign investors recorded net outflow of IDR 9Bn today and rupiah slightly strengthened to IDR 14,835/USD.

Banking stocks were positive as BBKA (+2.77%), BBRI (+3.95%), BMRI (+4.84%), BBNI (+2.93%), and BDMN (+4.61%) all advanced. Consumer names were mostly positive as HMSP (+1.79%), KLBF (+3.87%), KAEF (+10.03%), and ICBP (+0.74%) all up, except UNVR (-0.93%). Telco stocks were positive as TLKM (+7.42%), EXCL (+8.37%), and FREN (+6.67%) all rose. Mining names were positive as ADRO (+3.96%), INCO (+2.25%), ANTM (+4.26%), PTBA (+1.52%), and TINS (+3.7%) all inched higher. Other movers were BRPT (+5.06%), SMGR (+4.36%), KOTA (-6.19%), and MOLI (-5.79%).

Bank Indonesia (BI) noted that liquidity in the money economy in a broad sense (M2) increased again in Aug 2020 of IDR 6,726.1Tn or an increase of 13.3% YoY, higher than the growth in Jul which increased by 10.5% YoY.

### BOND MARKET

#### WITHIN RANGE

Indonesia bond market started the day unchanged. Selected buying in the morning session on 5Y to 15 Y possibly due to short covering by interbank players amid thin volume. Meanwhile, the other part of the yield curve was quoted within range. Prices were quoted unchanged and spread widened throughout the day. Nearing lunch time, government announced CPI September recorded 1.42%YoY above consensus 1.4%YoY and market showed no reaction. The 5Y/10Y/15Y benchmark closed at mid yield of 5.69%/6.91%/7.39%.

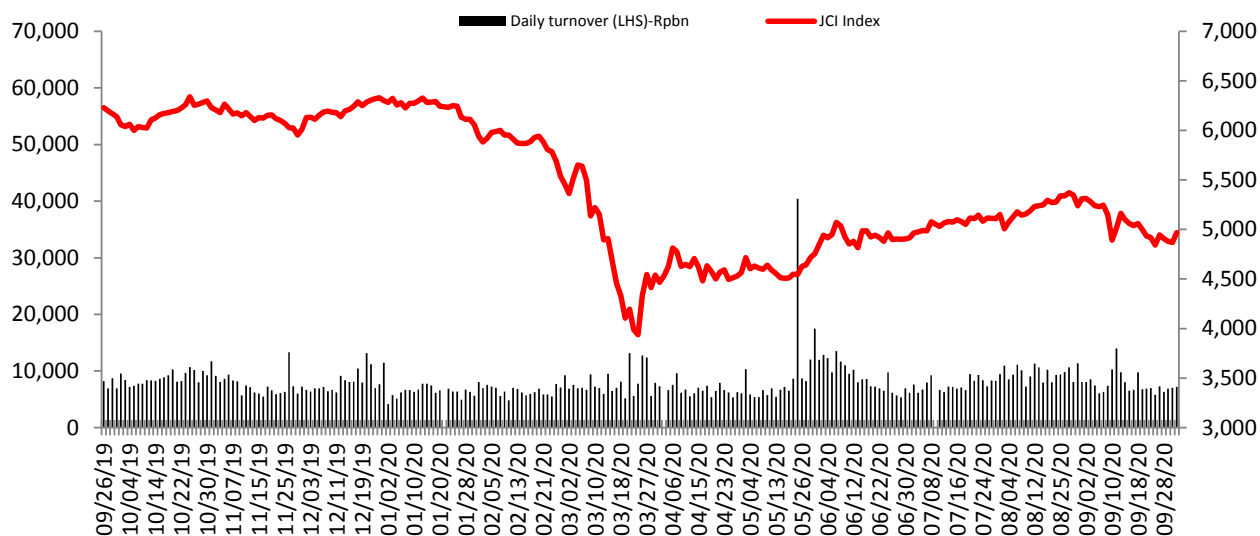


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ASSET MANAGEMENT

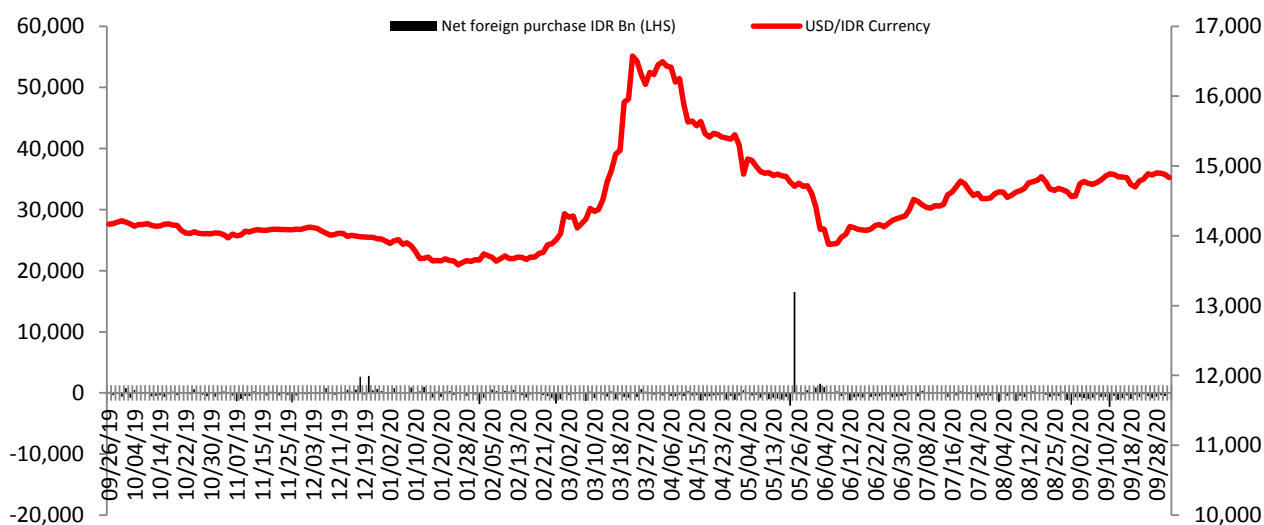
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## GRAPHS & TABLES

### 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	103.3	(0.0)	2.7	5Y
FR82	FR0082 Govt	100.8	0.2	1.2	10Y
FR80	FR0080 Govt	100.9	0.2	0.5	15Y
FR83	FR0083 Govt	100.7	(0.0)	1.2	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	4,970.1	2.1	(21.1)	
Thailand	SET Index	1,247.6	0.9	(21.0)	
Korean Stock Exch.	KOSPI Index	2,327.9	0.9	5.9	
Straight Times	FSSTI Index	2,500.7	1.4	(22.4)	
Kuala Lumpur	KLCI Index	1,496.8	(0.5)	(5.8)	
Philippines	PCOMP Index	5,944.9	1.4	(23.9)	
Nikkei	NKY Index	23,185.1	0.0	(2.0)	
Hang Seng	HSI Index	23,459.1	0.8	(16.8)	
MSCI-Asia pacific	MXAP Index	170.1	(0.1)	(0.4)	
<u>Global Indices</u>					
Dow Jones	INDU Index	27,781.7	1.2	(2.7)	
S&P 500	SPX Index	3,363.0	0.8	4.1	
Nasdaq	CCMP Index	11,167.5	0.7	24.5	
FTSE 100	UKX Index	5,907.9	0.7	(21.7)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,835.0	0.3	(6.5)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,950.0	0.3	6.9
3 month	IDSWT3M Index	14,941.5	0.0	(7.8)
6 month	IDSWT6M Index	14,942.5	0.1	(7.7)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,022.0	0.4	(7.7)
6 month	IDFWT6M Index	15,060.7	(0.3)	(6.2)
			(0.1)	

\*price as of 9/30/2020

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