

FOR PROFESSIONAL INVESTORS - 10/08/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

STRONG INFLOW AGAIN

JCI closed up today at 6,482 (+65.374 points or +1.02%). Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 2.4Tn today, fifth day in a row net inflow >Rp1tn. Rupiah was stabilized at IDR 14,225/USD.

Coal stocks quickly rebounded today with ADRO (+4.61%), ITGM (+4.08%) and PTBA (+3.73%) up. Banks led the index with BMRI (+2.99%), BBNI (+2.93%), BBKA (+1.82%) and BBRI (+0.97%) up. Lippo stocks continued to be loser with LPPF (-3.44%), MPPA (-6.83%) and MLPL (-6.70%) down. Telco stocks advanced as EXCL (+4.53%) and FREN (+1.00%) on potential merger news as well as TLKM (+2.15%). Other movers were ASSA (+15.09%), SRTG (+8.11%), AKRA (+6.28%) and MEDC (+5.26%) up.

The second wave of COVID-19 added pressure on the commercial real estate sector in Jakarta and even affected residential property, consulting firm Colliers International reported Wednesday. The occupancy rate for offices fell by 0.5 percentage points to 78.7 percent in the central business district (CBD) and by 0.6 percentage points to 77.8 percent outside the CBD in the July-to-September period from the previous quarter.

BOND MARKET

SLOW DAY

Indonesia bond market closed the week with higher yield around 5 – 9 bps ahead of tonight's US NFP data. We heard several offshore player showed their selling interest following 10Y UST touched 1.59%. While local players on the buy side. The benchmark series of 5, 10, 15 and 20Y closed the week at mid yield of 5.20%, 6.35%, 6.35% and 7.23% respectively. There will be fresh supply next week as Indonesia Debt Management Office ("DMO") will hold conventional bond auction with IDR 8Tn issuance target with max upside IDR 12Tn. The series that will be issued are 3M SPN, 12M SPN, 6Y FR90, 11Y FR91, 15Y FR88, 21Y FR92 and 30Y FR89.

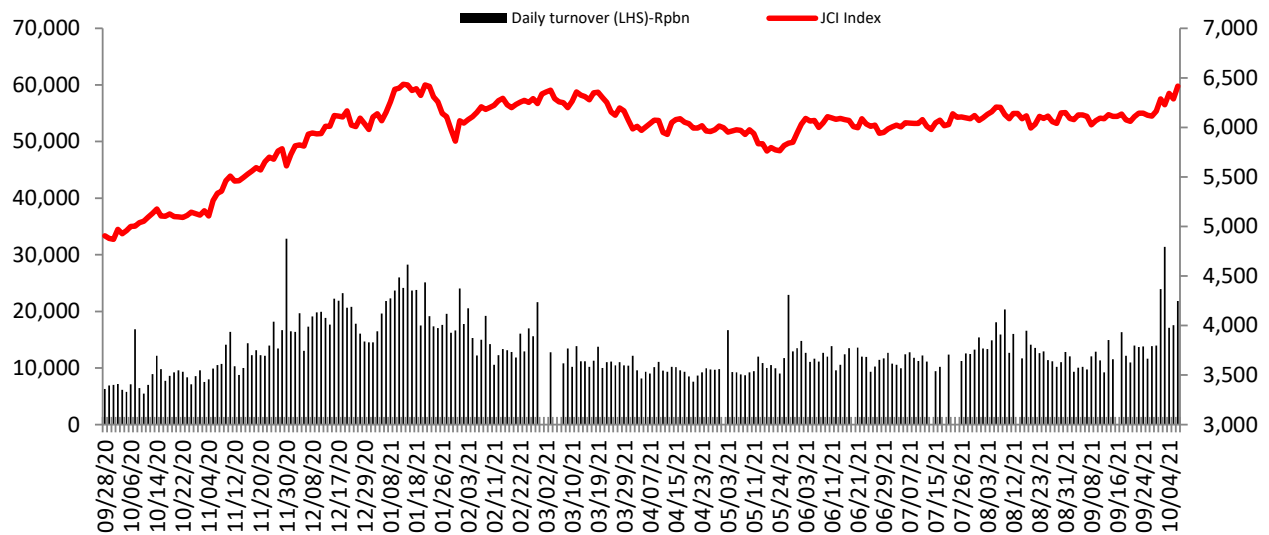


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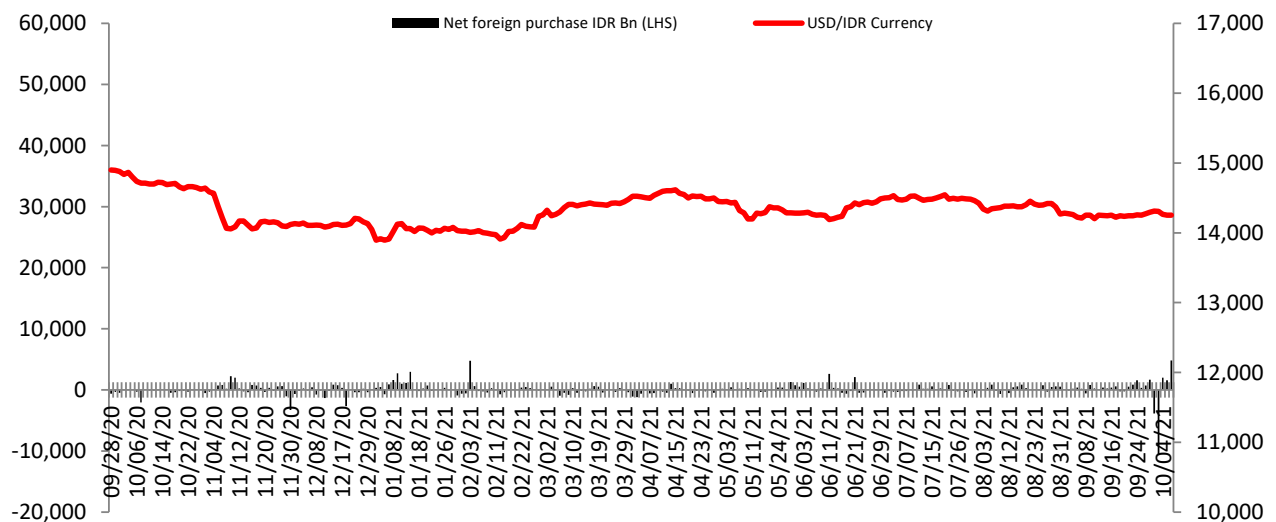
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GRAPHS & TABLES

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	101.4	(0.0)	(0.3)	5Y
FR82	FR0082 Govt	101.2	(0.3)	(3.4)	10Y
FR80	FR0080 Govt	99.3	0.0		15Y
FR83	FR0083 Govt	104.1	(0.2)	(6.0)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,417.3	2.1	7.3	
Thailand	SET Index	1,619.5	(0.3)	11.7	
Korean Stock Exch.	KOSPI Index	2,908.3	(1.8)	1.2	
Straight Times	FSSTI Index	3,083.9	0.5	8.4	
Kuala Lumpur	KLCI Index	1,559.4	1.9	(4.2)	
Philippines	PCOMP Index	7,057.5	1.1	(1.2)	
Nikkei	NKY Index	27,528.9	(1.1)	0.3	
Hang Seng	HSI Index	23,966.5	(0.6)	(12.0)	
MSCI-Asia pacific	MXAP Index	192.5	(0.8)	(3.7)	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,098.4	(0.6)	11.4	
S&P 500	SPX Index	4,318.7	(0.6)	15.0	
Nasdaq	CCMP Index	14,375.2	(0.4)	11.5	
FTSE 100	UKX Index	7,004.3	(1.0)	8.4	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,253.0	0.0	(1.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,250.0	(0.2)	1.1
3 month	IDSWT3M Index	14,255.5	(0.1)	(1.1)
6 month	IDSWT6M Index	14,256.4	(0.1)	(1.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,392.0	0.2	(1.6)
6 month	IDFWT6M Index	14,440.2	(0.2)	(0.2)

*price as of 10/5/2021


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