

FOR PROFESSIONAL INVESTORS - 09/16/2021

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### SLIDE DOWN

JCI slightly weakened and closed at 6,110 (-19 points or -0.31%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net inflow of IDR 222Bn today and rupiah was stabilized at IDR 14,243/USD.

Banking stocks were mixed as BDMN (+5.74%) and BMRI (+0.41%) rose, while BBNI (-0.93%), BBRI (-1.08%), and BBKA (-0.76%) closed lower. Consumer names were mixed as INDF (+1.21%) and KLPF (+0.68%) rose, while ICBP (-0.89%), GGRM (-1.54%), and HMSP (-1.97%) declined. Pulp & paper stocks were negative as TKIM (-3.28%) and INKP (-4.44%) all retreated. Construction names were positive as WKA (+7.25%), WSKT (+5.42%), PTPP (+4.95%), and ADHI (+7.19%) all rose. Other movers were ASMI (+25%), UBN (+24.59%), POLI (-6.92%), and BBHI (-6.72%).

Indonesia reported surplus of US\$4.7bn in Aug-21 (+81.5% MoM), the record-high figure and also it was the 17 consecutive months of surplus. Export reached US\$21.4bn (+20.9% MoM), supported by increasing volume and price of commodities, including palm oil and coal. Import was at US\$16.7bn (+10.4% MoM) - there is higher imports of raw materials at US\$12.4bn (+8.39% MoM).

### BOND MARKET

#### FLATTISH

The bond market saw no improvement in risk sentiment today although we witnessed two ways trading in the market. Morning session saw buying interest started by onshore players. While on the afternoon session as we witnessed mixed names showed their selling interest particularly after London opened although trading volume remained thin. Thin trading volume during the day pushed bidders to be more defensive. Price movement went back to range bound lacking fresh catalyst

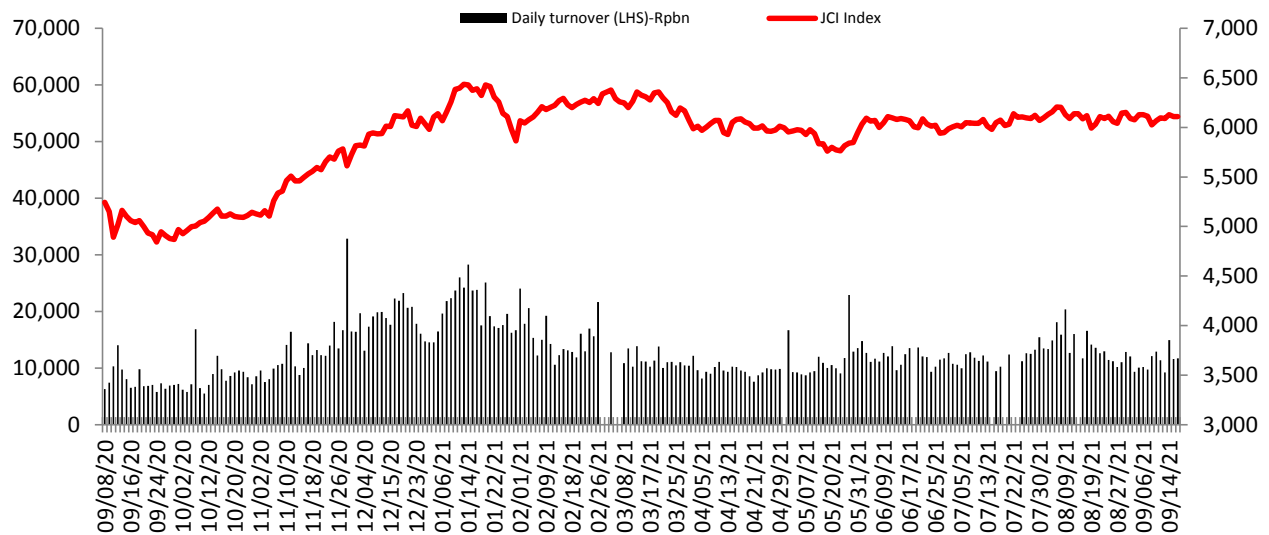


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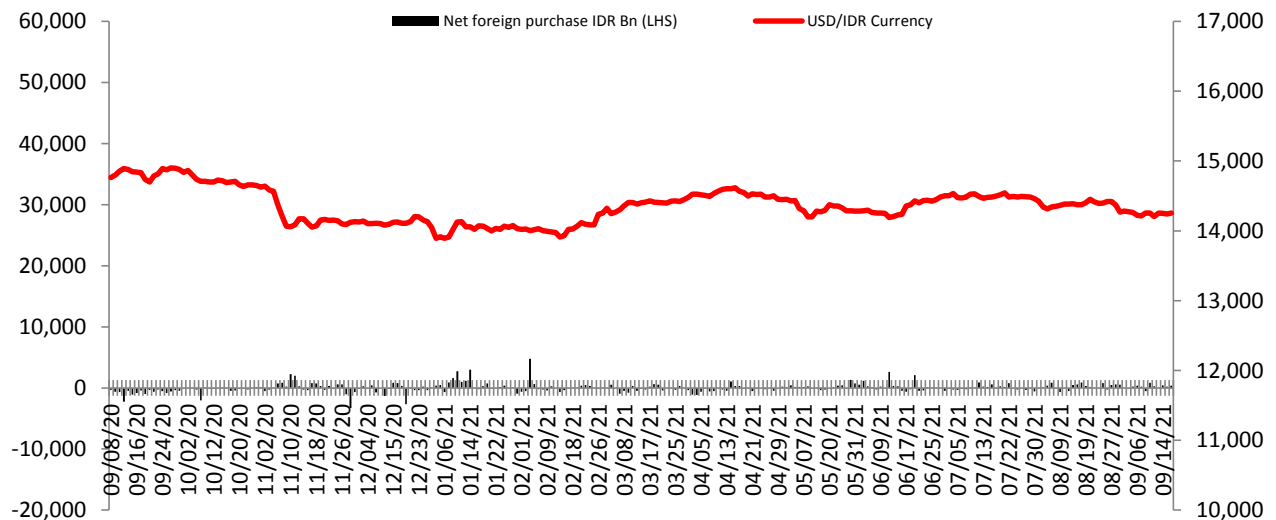
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## GRAPHS & TABLES

### 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	101.8	(0.1)	0.1	5Y
FR82	FR0082 Govt	102.7	(0.0)	(2.0)	10Y
FR80	FR0080 Govt	100.1	(0.0)		15Y
FR83	FR0083 Govt	106.8	(0.0)	(3.6)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,109.9	(0.0)	2.2	
Thailand	SET Index	1,631.7	0.2	12.6	
Korean Stock Exch.	KOSPI Index	3,130.1	(0.7)	8.9	
Straight Times	FSSTI Index	3,064.5	0.2	7.8	
Kuala Lumpur	KLCI Index	1,555.3	(0.0)	(4.4)	
Philippines	PCOMP Index	6,968.4	1.3	(2.4)	
Nikkei	NKY Index	30,323.3	(0.6)	10.5	
Hang Seng	HSI Index	24,667.9	(1.5)	(9.4)	
MSCI-Asia pacific	MXAP Index	204.4	(0.7)	2.2	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,814.4	0.7	13.7	
S&P 500	SPX Index	4,480.7	0.8	19.3	
Nasdaq	CCMP Index	15,161.5	0.8	17.6	
FTSE 100	UKX Index	7,050.3	0.5	9.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,253.0	(0.1)	(1.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,250.0	(0.0)	1.1
3 month	IDSWT3M Index	14,245.7	(0.1)	(1.1)
6 month	IDSWT6M Index	14,250.0	(0.0)	(1.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,296.2	0.1	(1.0)
6 month	IDFWT6M Index	14,365.0	(0.1)	0.4

\*price as of 9/15/2021

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