



FOR PROFESSIONAL INVESTORS - 07/13/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### DOWN

JCI weakened and closed at 6,641 (-77 points or -1.15%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 881Bn today and rupiah was stabilized at IDR 14,988/USD.

Banking stocks were negative as BBTN (-1.4%), BBNI (-3.02%), BMRI (-2.02%), BBRI (-1.22%), and BBCA (-2.44%) all closed lower. Consumer names were mixed as KLBK (+0.6%) and UNVR (+0.41%) rose, while ICBP (-0.27%), SIDO (-2.55%), and INDF (-3.19%) corrected. Material stocks were positive as BRPT (+6.06%) and TPIA (+1.66%) all in green. Infra names were mixed as TBIG (+1.05%) and TOWR (+0.44%) in green, while JSMR (-3.07%) and PGAS (-3.45%) declined. Other movers were BFIN (+10%), ARTO (+5.44%), ESSA (-6.92%), and BUMI (-5.06%).

The State Administrative Court (PTUN) has revoked the revision of DKI Jakarta 2022 Provincial Minimum Wage (UMP) for 2022. This means that the minimum wage has changed from the previous Rp4.64mn to Rp4.57mn for this year, still up +0.85% from the 2021 UMP.

### BOND MARKET

#### WITHIN RANGE

The mixed sentiment continued to be seen in the bond market today. The bond price opened around the same level as yesterday's closing and we witnessed several sporadic activity. Overall, IDR bonds yield lower 2 – 4 bps compared to yesterday closing, but IDR bonds still traded within range. Anxiety ahead of US CPI data tonight pushed players to place defensive bids. The benchmark of 5Y, 10Y, 15Y and 20Y closed at mid yields of 6.23%, 7.22%, 7.29% and 7.33% respectively.

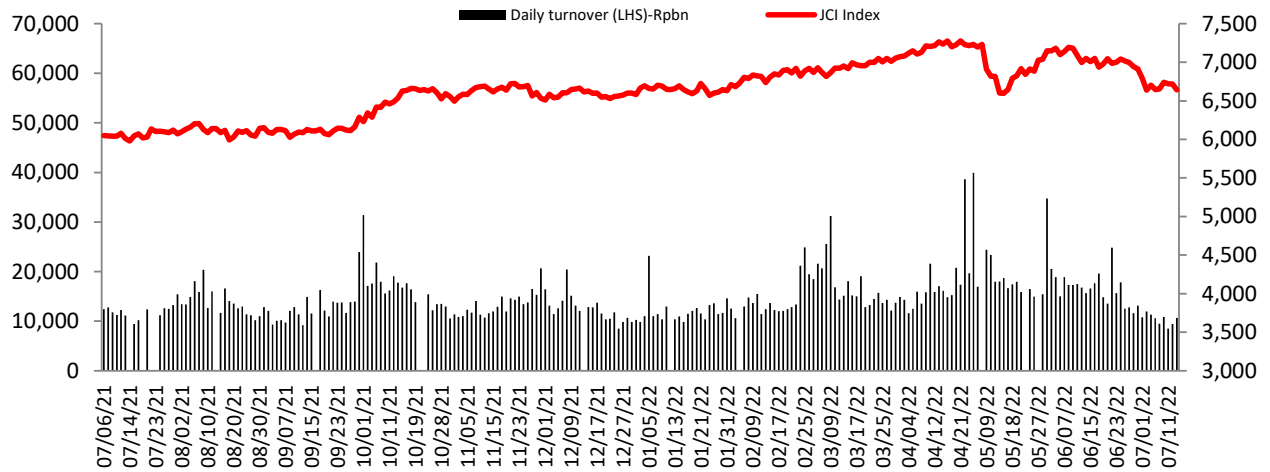


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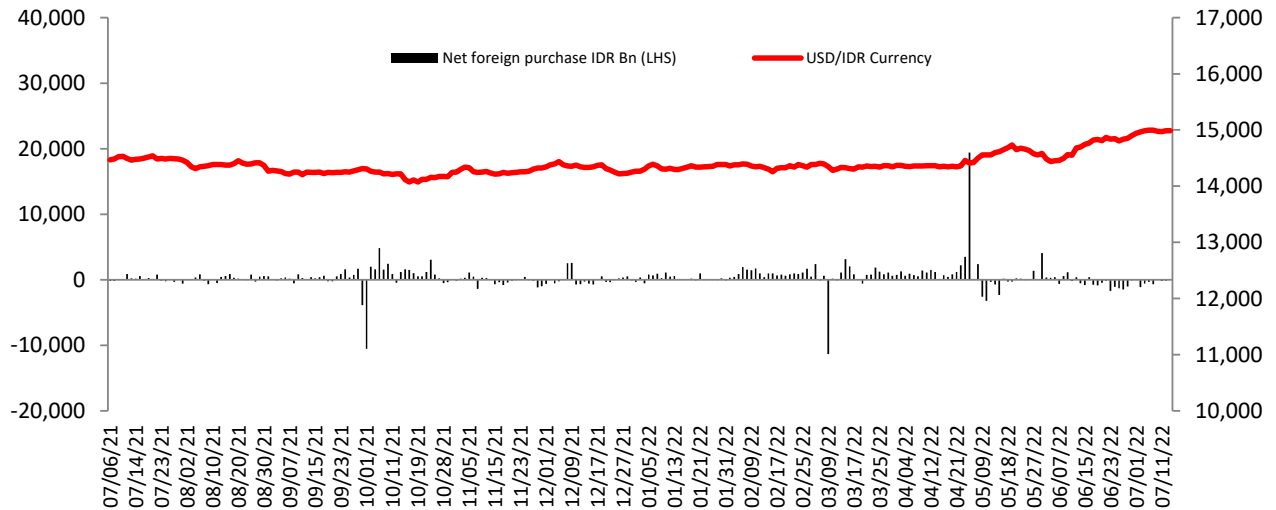
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## GRAPHS & TABLES

### 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	95.5	(0.1)	(5.4)	5Y
FR82	FR0082 Govt	94.2	0.3	(6.6)	10Y
FR80	FR0080 Govt	91.6	0.1		15Y
FR83	FR0083 Govt	97.7	0.1	(4.8)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,641.0	(1.2)	0.9	
Thailand	SET Index	1,546.8	(0.7)	(6.7)	
Korean Stock Exch.	KOSPI Index	2,328.6	0.5	(21.8)	
Straight Times	FSSTI Index	3,124.0	(0.7)	0.0	
Kuala Lumpur	KLCI Index	1,411.3	(1.0)	(10.0)	
Philippines	PCOMP Index	6,255.4	(1.5)	(12.2)	
Nikkei	NKY Index	26,478.8	0.5	(8.0)	
Hang Seng	HSI Index	20,798.0	(0.2)	(11.1)	
MSCI-Asia pacific	MXAP Index	155.0	(1.1)	(19.8)	
<u>Global Indices</u>					
Dow Jones	INDU Index	30,981.3	(0.6)	(14.7)	
S&P 500	SPX Index	3,818.8	(0.9)	(19.9)	
Nasdaq	CCMP Index	11,264.7	(0.9)	(28.0)	
FTSE 100	UKX Index	7,154.4	(0.8)	(3.1)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,988.0	0.0	(4.9)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,993.5	0.1	5.1
3 month	IDSWT3M Index	14,993.2	0.2	(5.0)
6 month	IDSWT6M Index	14,994.6	0.2	(5.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	150.1	(99.0)	99.0
6 month	IDFWT6M Index	1,554.0	1.1	89.2
			(0.1)	(5.7)

\*price as of 7/13/2022

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\* PT BNP Asset Management (address: Sequis Tower, 29<sup>th</sup> Floor, Jl. Jend. Sudirman Kav. 71, SCBD Lot 11B, Jakarta 12190 - INDONESIA).

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