

FOR PROFESSIONAL INVESTORS - 06/10/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

UP

JCI advanced and closed at 6,108 (+60 points or +0.99%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 45Bn today and rupiah was stabilized at IDR 14,248/USD.

Banking stocks were mostly positive as BBKA (+1.38%), BBRI (+1.9%), BMRI (+0.81%), and BBNI (+0.89%) all in green, except BBTN (-0.93%). Consumer names were mixed as HMSP (+1.25%), GGRM (+2.21%), and SIDO (+1.31%) in green, INDF (-0.4%) weakened, and UNVR unchanged. Telco stocks were positive as TLKM (+2.65%), EXCL (+4.05%), and ISAT (+1.47%) all rose. Retailer names were mixed as AMRT (+10.31%) and ERAA (+7.5%) in green, while MAPA (-3.79%) and MAPI (-6.58%) retreated. Other movers were BKSW (+33.81%), MLPT (+24.92%), CMNP (-6.42%), and TBIG (-5.54%).

The gov't plans not to increase the excise tariff on tobacco products in 2022. As a consequence, the gov't will set the ideal tariff to adjust the retail selling price (HJE), which is currently being evaluated at around 10-12.5%.

BOND MARKET

FLOW DRIVEN

Positive sentiment extended until today following 10Y UST yield touched 1.48%. Biddish tone was felt as soon as market opened, triggered by moderate flow into belly part of the curve. 5Y FR86 and 10Y FR87 got traded to as high as 100.45 (5.4%) and 101.15 (6.33%) respectively. However, the sentiment was soon capped by profit takers that were too happy to book gain on positive price movement. Bond yield closed lower by 2 – 3 bps. Total foreign ownership went up to IDR 970.61Tn on Jun 8th 2021, from previously IDR 957.46Tn on May 31st 2021.

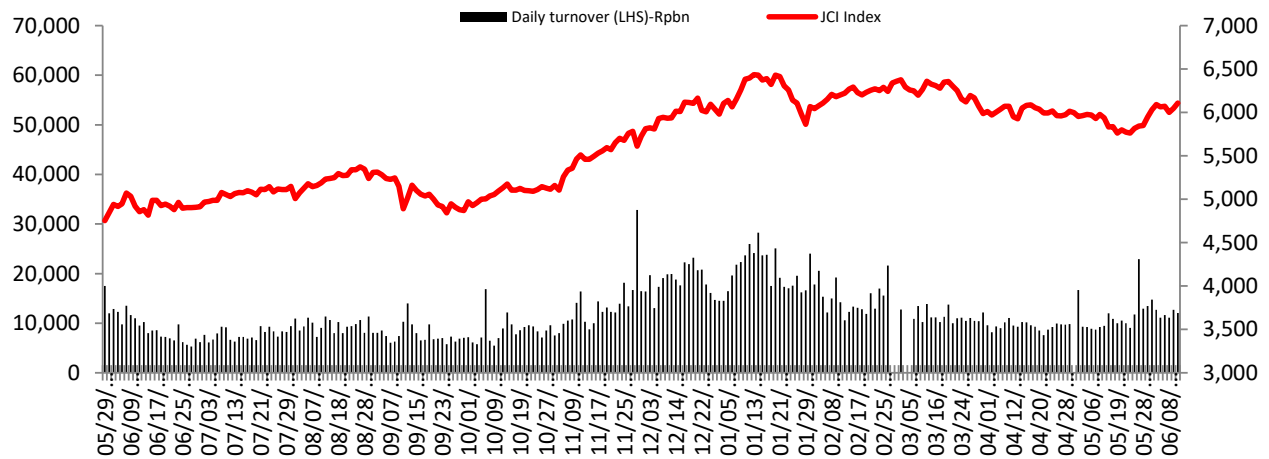


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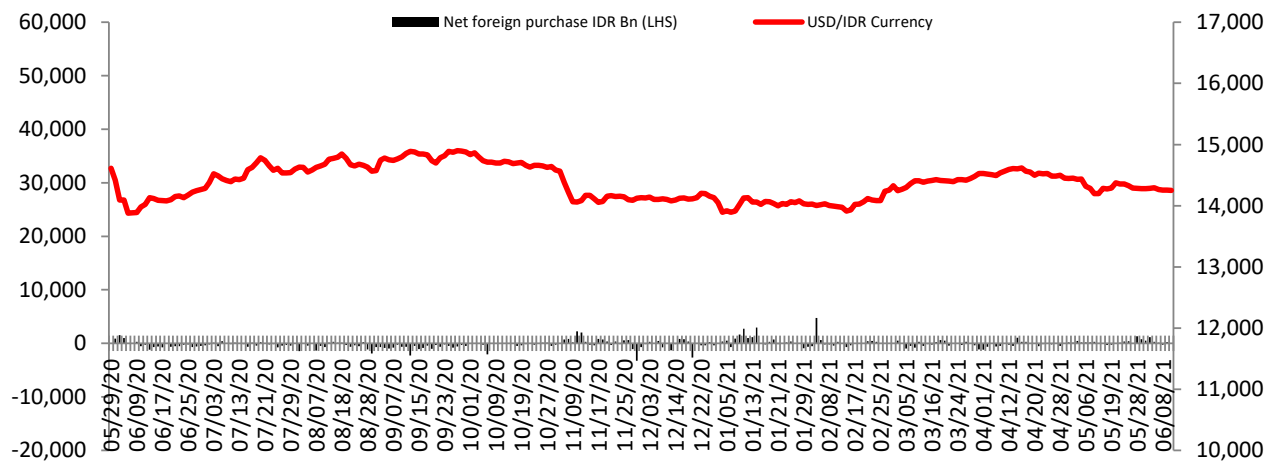
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GRAPHS & TABLES

JCI & DAILY TURNOVER



IDR & NET FOREIGN PURCHASES



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EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
<u>Bonds</u>					
FR81	FR0081 Govt	100.5	0.1	(1.2)	5Y
FR82	FR0082 Govt	101.0	0.2	(3.6)	10Y
FR80	FR0080 Govt	99.6	0.1		15Y
FR83	FR0083 Govt	105.1	0.1	(5.1)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,107.5	1.0	2.1	
Thailand	SET Index	1,625.3	(0.1)	12.1	
Korean Stock Exch.	KOSPI Index	3,224.6	0.3	12.2	
Straight Times	FSSTI Index	3,162.5	0.3	11.2	
Kuala Lumpur	KLCI Index	1,579.9	(0.1)	(2.9)	
Philippines	PCOMP Index	6,875.7	(0.4)	(3.7)	
Nikkei	NKY Index	28,958.6	0.3	5.5	
Hang Seng	HSI Index	28,738.9	(0.0)	5.5	
MSCI-Asia pacific	MXAP Index	208.9	(0.5)	4.5	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,447.1	(0.4)	12.5	
S&P 500	SPX Index	4,219.6	(0.2)	12.3	
Nasdaq	CCMP Index	13,911.8	(0.1)	7.9	
FTSE 100	UKX Index	7,101.8	0.3	9.9	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,248.0	0.0	(1.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,258.0	(0.1)	1.2
3 month	IDSWT3M Index	14,262.1	(0.0)	(1.2)
6 month	IDSWT6M Index	14,262.9	(0.0)	(1.2)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,291.6	0.0	(0.9)
6 month	IDFWT6M Index	14,361.0	(0.3)	0.4

*price as of 6/9/2021


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