

FOR PROFESSIONAL INVESTORS - 09/06/2023

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Flat

JCI was flat and closed at 6,996 (+4 points or +0.06%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 19Bn today and rupiah slightly weakened to IDR 15,293/USD.

Banking stocks were mostly negative as BBNI (-0.52%), BMRI (-0.82%), BBCA (-0.81%), and BBRI (-0.89%) all corrected, except PNBK (+2.71%). Consumer names were mostly negative as GGRM (-1.62%), MYOR (-1.6%), ICBP (-1.12%), and KLBF (-1.69%) all down, except UNVR (+0.83%). Mining stocks were mostly positive as ADRO (+4.74%), PTBA (+2.05%), INDY (+3.41%), and ITMG (+0.57%) all in green, except ANTM (-0.26%). Properties names were negative as SMRA (-1.55%), PWON (-1.75%), BSDE (-2.7%), and CTRA (-3.11%) all closed lower. Other movers were MEDC (+9.96%), PTPP (+9.48%), FREN (-5.08%), and EMTK (-3.36%).

The Coordinating Ministry for Maritime Affairs and Investment (Kemenko Marves) plans to close private (industrial) coal power plants (PLTU) to reduce pollution. The target is private coal power plants owned by industry players, not coal power plants owned by independent power producers (IPP) who are bound by a Power Purchase Agreement (PPA) with PLN.

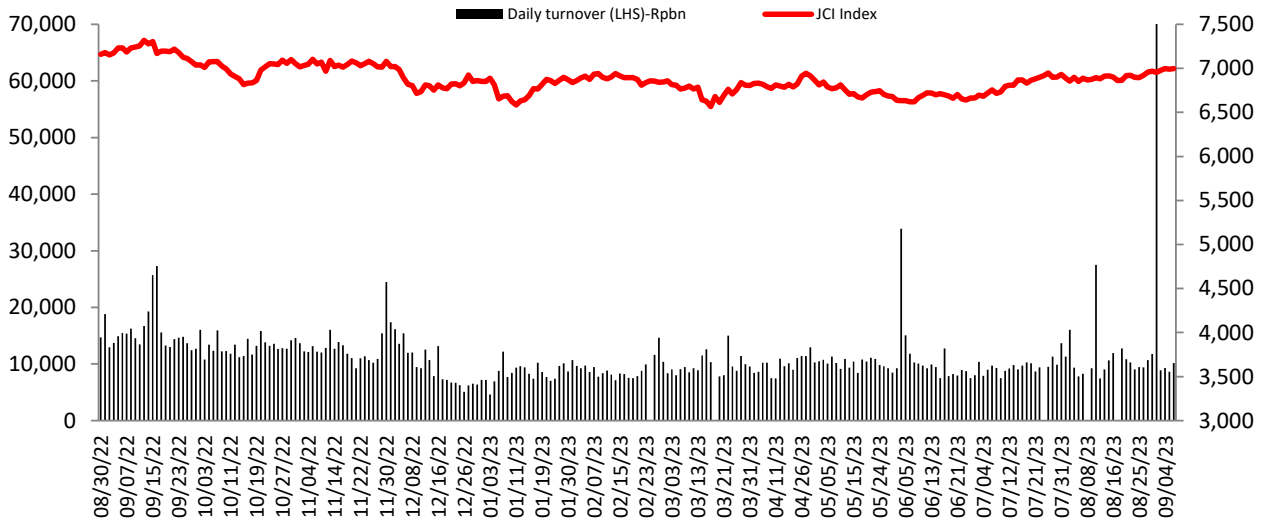
BOND MARKET

LACKLUSTER TRADING

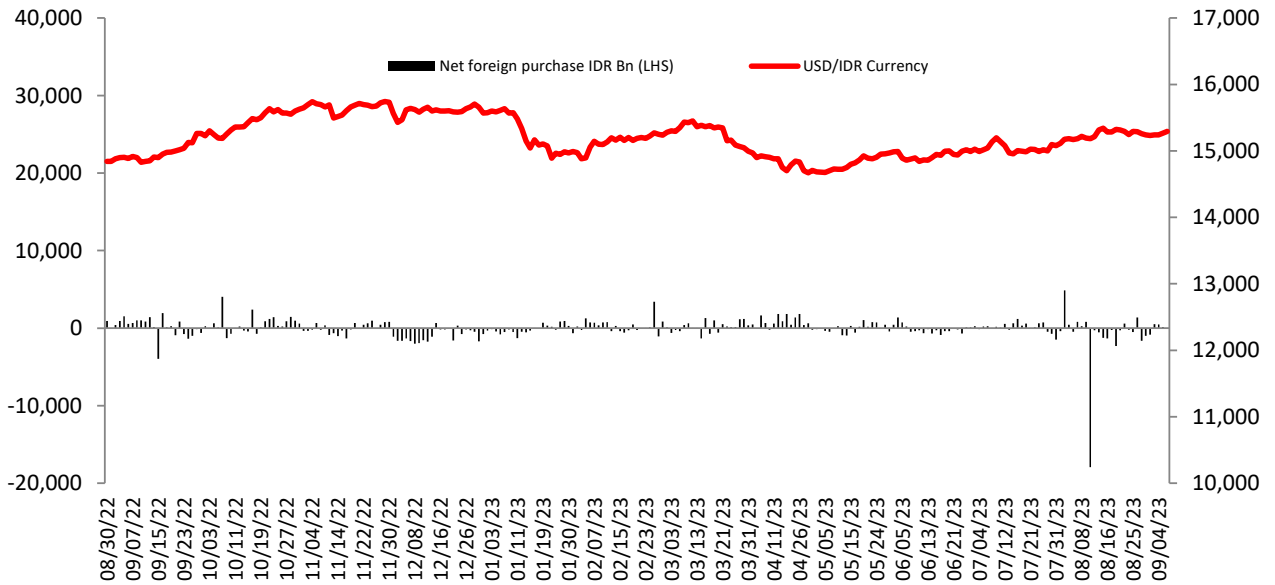
Bond market opened wider as price quotation continued its downward movement from yesterday following 10Y UST yield higher at 4.26%. Several selling activities were seen especially on 5Y and 10Y series but the trade volumes were small until the trading session end. FR96 traded at 6.56% and FR95 traded at 6.22%. Weakness in bond was in line with that in USD/IDR as the pair closed higher at 15,300/320.

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>					
FR90	FR0090 Govt	97.0	(0.0)	0.8	5Y
FR91	FR0091 Govt	99.3	(0.3)	3.1	10Y
FR93	FR0093 Govt	98.9	(0.4)	2.1	15Y
FR92	FR0092 Govt	105.0	0.0	4.6	20Y
PBS036	INDOIS 5 ¼ 08/15/25	98.4	(0.0)	0.8	15-8-2025
PBS003	INDOIS 6 01/15/27	100.1	(0.0)	1.8	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	102.4	(0.1)		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	100.1	0.0	5.5	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,996.0	0.1	2.1	
Thailand	SET Index	1,550.4	0.2	(7.1)	
Korean Stock Exch.	KOSPI Index	2,563.3	(0.7)	14.6	
Straight Times	FSSTI Index	3,222.9	(0.1)	(0.9)	
Kuala Lumpur	KLCI Index	1,460.6	0.4	(2.3)	
Philippines	PCOMP Index	6,241.7	0.3	(4.9)	
Nikkei	NKY Index	33,241.0	0.6	27.4	
Hang Seng	HSI Index	18,450.0	(0.0)	(6.7)	
MSCI-Asia pacific	MXAP Index	162.8	(0.9)	4.6	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,642.0	(0.6)	4.5	
S&P 500	SPX Index	4,496.8	(0.4)	17.1	
Nasdaq	CCMP Index	14,021.0	(0.1)	34.0	
FTSE 100	UKX Index	7,386.6	(0.7)	(0.9)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,293.0	(0.2)	1.8
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,265.6	0.1	(2.9)
3 month	IDSWT3M Index	15,258.6	0.0	2.1
6 month	IDSWT6M Index	15,261.5	0.1	2.0
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,266.1	0.1	2.0
6 month	IDFWT6M Index	15,280.0	0.2	2.3

*price as of 9/5/2023

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