



FOR PROFESSIONAL INVESTORS - 06/02/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### FLAT

JCI was flat and closed at 7,149 (0 points or 0%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 342Bn today and rupiah advanced to IDR 14,483/USD.

Banking stocks were mostly negative as BBNI (-3.54%), BBKA (-2.26%), BMRI (-3.53%), and BBRI (-3.24%) all declined, except PNBK (+13.69%). Consumer names were mixed as INDF (+1.52%) and UNVR (+1.27%) rose, while SIDO (-1.96%), HMSP (-2.69%), and KLBF (-4.18%) closed lower. Infra stocks were negative as JSR (-0.75%), PGAS (-0.83%), TOWR (-2%), and TBIG (-5.08%) all retreated. Mining names were mixed as ADRO (+1.83%), TINS (+5%), and INDY (+1.73%) up, while ITMG (-0.93%) and INCO (-3.65%) down. Other movers were ISAT (+8.92%), SMDR (+8.29%), ESSA (-6.38%), and MDKA (-4.59%).

Indonesia May CPI at 3.55% YoY, est +3.59% YoY.

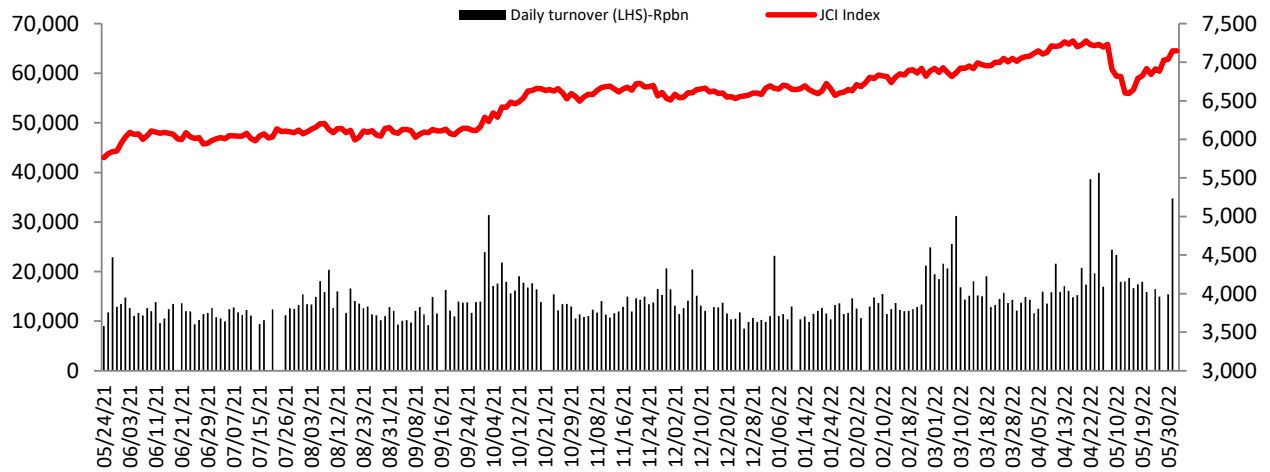
### BOND MARKET

#### BETTER SENTIMENT

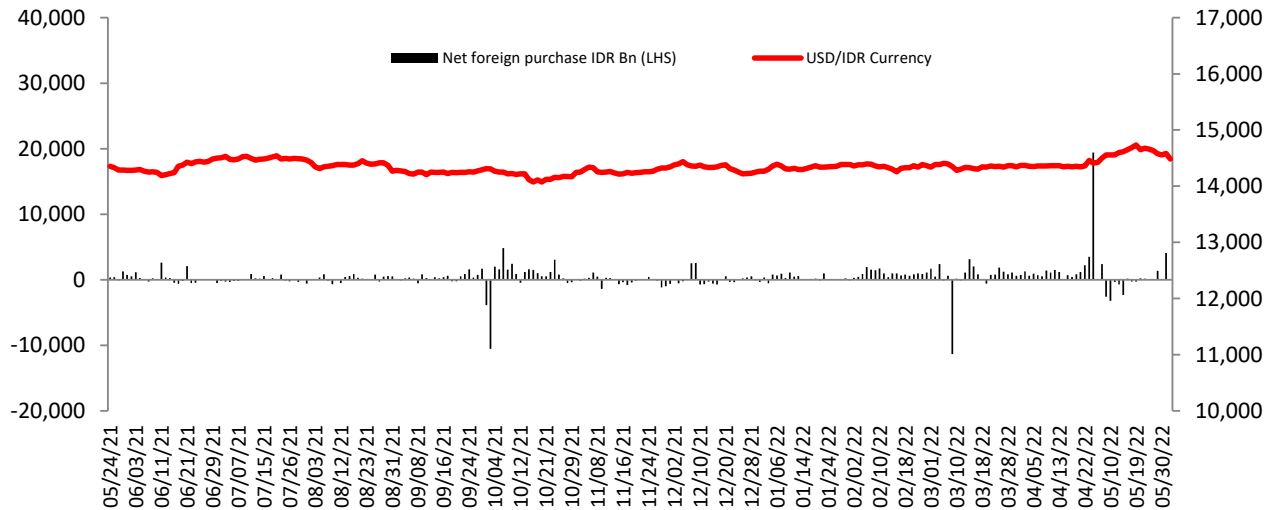
After one day trading off yesterday, Indonesia bond market opened weaker with wide spread today with 10Y UST yield weaker to 2.92%. In the morning session, we witnessed mixed names showed their selling interest although trading volume remained thin. In the middle of the day, Government announced CPI May recorded at 3.55% YoY/0.40% MoM lower against consensus (+3.59% YoY/ +0.41% MoM). Post the announcement, soon triggered buying that started in the 10Y FR91 followed by the rest of the curve. The bullish tone following local currency strengthened below 14,520 in the spot. The yield of 5/10/15/20Y benchmark closed the day at mid-yield of 6.04%/6.97%/7.31%/7.3% respectively.

# 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    | 95.9     | 0.0        | (5.0)      | 5Y    |
| FR82                  | FR0082 Govt    | 95.5     | 0.1        | (5.2)      | 10Y   |
| FR80                  | FR0080 Govt    | 91.5     | (0.0)      |            | 15Y   |
| FR83                  | FR0083 Govt    | 98.1     | 0.0        | (4.4)      | 20Y   |
| <u>Asia Pacific</u>   |                |          |            |            |       |
| Jakarta Composite     | JCI Index      | 7,148.7  | (0.0)      | 8.6        |       |
| Thailand              | SET Index      | 1,646.2  | (0.8)      | (0.7)      |       |
| Korean Stock Exch.    | KOSPI Index    | 2,659.0  | (1.0)      | (10.7)     |       |
| Straight Times        | FSSTI Index    | 3,225.1  | (0.6)      | 3.2        |       |
| Kuala Lumpur          | KLCI Index     | 1,547.6  | (0.4)      | (1.3)      |       |
| Philippines           | PCOMP Index    | 6,686.8  | (0.4)      | (6.1)      |       |
| Nikkei                | NKY Index      | 27,413.9 | (0.2)      | (4.8)      |       |
| Hang Seng             | HSI Index      | 21,082.1 | (1.0)      | (9.9)      |       |
| MSCI-Asia pacific     | MXAP Index     | 169.1    | (0.2)      | (12.4)     |       |
| <u>Global Indices</u> |                |          |            |            |       |
| Dow Jones             | INDU Index     | 32,813.2 | (0.5)      | (9.7)      |       |
| S&P 500               | SPX Index      | 4,101.2  | (0.7)      | (14.0)     |       |
| Nasdaq                | CCMP Index     | 11,994.5 | (0.7)      | (23.3)     |       |
| FTSE 100              | UKX Index      | 7,533.0  | (1.0)      | 2.0        |       |

|                    | Bloomberg Code | IDR      | % Chg. D-D | % Chg. YTD |
|--------------------|----------------|----------|------------|------------|
| Spot IDR           | IDR Curncy     | 14,483.0 | 0.7        | (1.6)      |
| <u>Swap-IDR</u>    |                |          |            |            |
| 1 month            | IDSWT1M Index  | 14,545.2 | (0.2)      | 2.0        |
| 3 month            | IDSWT3M Index  | 14,592.0 | 0.3        | (2.2)      |
| 6 month            | IDSWT6M Index  | 14,595.0 | 0.4        | (2.3)      |
| <u>Forward-IDR</u> |                |          |            |            |
| 3 month            | IDFWT3M Index  | 14,597.7 | 0.4        | (2.0)      |
| 6 month            | IDFWT6M Index  | 14,650.0 | (0.4)      | (1.8)      |
|                    |                |          |            | (3.5)      |

\*price as of 6/2/2022

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