

FOR PROFESSIONAL INVESTORS - 07/02/2020

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

INTRADAY HIGH

JCI advanced and closed at 4,967 (+52 points or +1.07%) today. Shares across regional markets were positive as virus shot from Pfizer, BioNtech shows promise in early test. Meanwhile, foreign investors recorded net outflow on 17th day of IDR 210Bn today and rupiah weakened to IDR 14,378/USD.

Banking stocks were mostly positive as BBKA (+1.21%), BBNI (+1.1%), BMRI (+0.2%), and BDMN (+1.47%) all inched higher, except BNLI (-0.39%). Consumer names were mostly positive as UNVR (+3.21%), ICBP (+3.8%), KLBF (+2.05%), and HMSP (+0.31%) all up, except SIDO (-1.99%). Properties stocks were positive as PWON (+3.88%), CTRA (+6.61%), BSDE (+4.83%), and SMRA (+7.5%) all closed higher. Construction names were positive as PTPP (+11.36%), WIKA (+5.15%), WSKT (+5%), and ADHI (+9.92%) all up. Other movers were TKIM (+9.7%), INCO (+5%), NATO (-6.67%), and BALI (-6.15%).

Central Bureau of Statistics (BPS) records inflation level of 0.18% in Jun 2020. This level is higher than the level during Ramadhan and Eid Al-Fitr on Apr and May level of 0.08% and 0.07% respectively.

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 selling interest started by onshore foreign players. While on the afternoon session as we witnessed several names showed their buying interest particularly after London opened although trading volume remained thin. Thin trading volume during the day pushed bidders to be more defensive with Rupiah weakening against USD. Price movement went back to range bound.

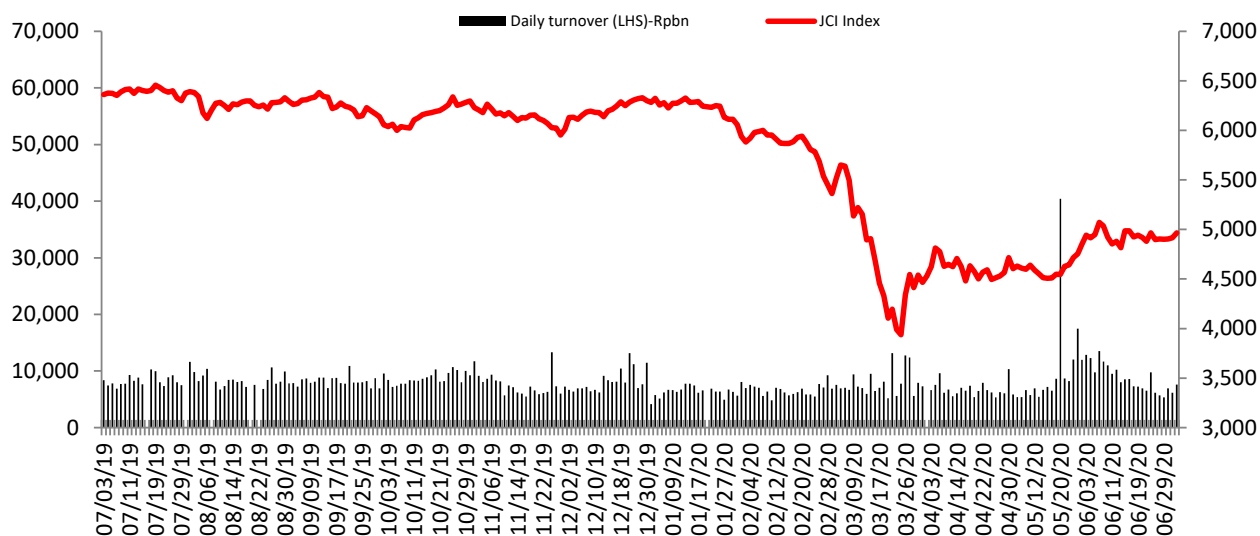


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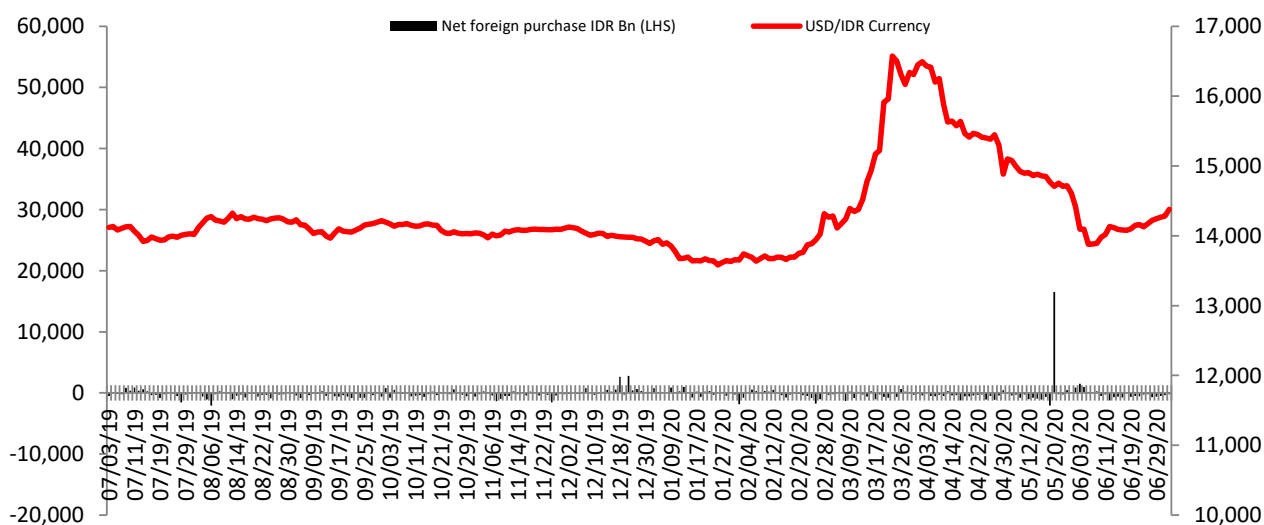
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GRAPHS & TABLES

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	99.9	0.1	(0.6)	5Y
FR82	FR0082 Govt	98.6	0.1	(0.9)	10Y
FR80	FR0080 Govt	99.1	(0.1)	(1.3)	15Y
FR83	FR0083 Govt	98.6	(0.1)	(1.0)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	4,966.8	1.1	(21.2)	
Thailand	SET Index	1,374.1	1.8	(13.0)	
Korean Stock Exch.	KOSPI Index	2,135.4	1.4	(2.8)	
Straight Times	FSSTI Index	2,636.7	1.0	(18.2)	
Kuala Lumpur	KLCI Index	1,536.3	1.4	(3.3)	
Philippines	PCOMP Index	6,364.1	2.5	(18.6)	
Nikkei	NKY Index	22,146.0	0.1	(6.4)	
Hang Seng	HSI Index	25,124.2	2.9	(10.9)	
MSCI-Asia pacific	MXAP Index	157.9	(0.0)	(7.5)	
<u>Global Indices</u>					
Dow Jones	INDU Index	25,735.0	(0.3)	(9.8)	
S&P 500	SPX Index	3,115.9	0.5	(3.6)	
Nasdaq	CCMP Index	10,154.6	1.0	13.2	
FTSE 100	UKX Index	6,196.6	0.6	(17.8)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,378.0	(0.7)	(3.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,605.0	1.6	4.5
3 month	IDSWT3M Index	14,634.3	0.9	(5.6)
6 month	IDSWT6M Index	14,406.7	(0.1)	(3.9)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,563.7	0.4	(4.4)
6 month	IDFWT6M Index	14,859.0	1.6	(4.7)

*price as of 7/1/2020


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