

FOR PROFESSIONAL INVESTORS - 08/02/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

FLAT

JCI slightly strengthened and closed at 6,097 (+27 points or +0.44%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net outflow of IDR 3Bn today and rupiah slightly strengthened to IDR 14,423/USD.

Consumer stocks were positive as UNVR (+4.27%), KLBF (+3.57%), INDF (+1.65%), MYOR (+1.36%), and HMSP (+0.48%) all up. Banking names were mixed as BBRI (+0.81%), MEGA (+1.59%), and BBNI (+0.84%) closed higher, while BMRI (-0.44%) and BBCA (-0.17%) declined. Retailer stocks were mostly positive as AMRT (+5.56%), MAPI (+4.03%), and MAPA (+5.5%) all up, except ACES (-1.14%). Telco names were mixed as TLKM (+2.16%) and FREN (+4.67%) rose, while EXCL (-1.49%) weakened. Other movers were BABP (+23.46%), DSSA (+17.3%), MAYA (-6.92%), and BINA (-5.58%).

Iron and Steel export grew by 93% yoy in 6M21, and is now the second biggest non-oil and gas export from Indonesia

BOND MARKET

TIGHT RANGE

The bond market managed to end slightly higher today. Prices moved in tight range throughout the day as overall market tone was bullish and crowded by both interbank as well as onshore players. Market witnessed tight trading range particularly in front to belly part of the curve. However, the positive price action was quickly capped by profit takers.

There will be fresh supply tomorrow as Indonesia Debt Management Office ("DMO") will hold conventional bond auction with IDR 33Tn issuance target. The series that will be issued are 3M SPN, 9M SPN, 6Y FR90, 11Y FR91, 15Y FR88, 21Y FR92 and 30Y FR89. In the previous conventional auction, incoming bids reached IDR 95.55Tn and DMO issued IDR 34Tn.

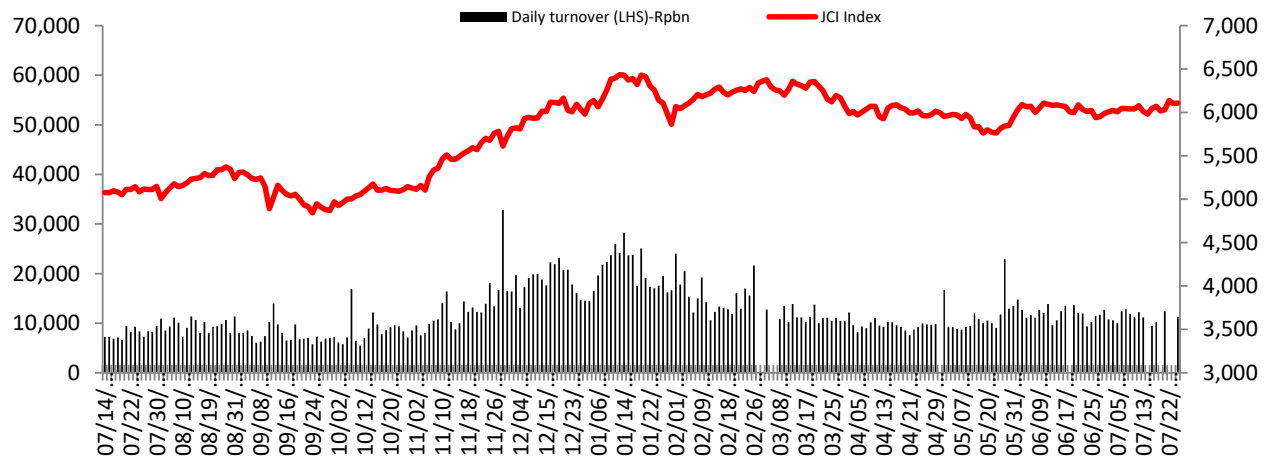


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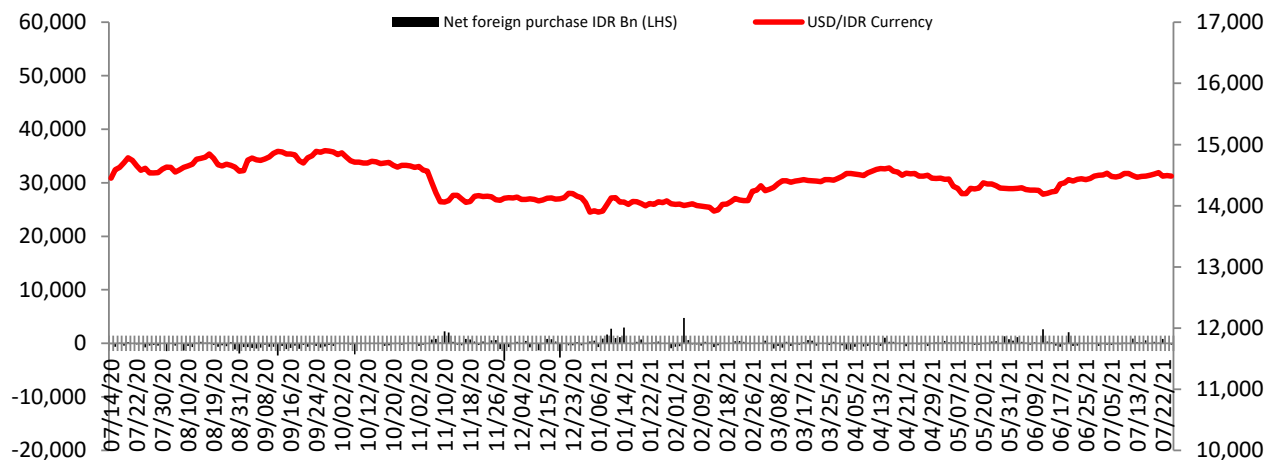
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GRAPHS & TABLES

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	101.5	0.0	(0.2)	5Y
FR82	FR0082 Govt	101.6	0.0	(3.0)	10Y
FR80	FR0080 Govt	99.7	0.0		15Y
FR83	FR0083 Govt	105.4	0.3	(4.9)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,096.5	0.4	2.0	
Thailand	SET Index	1,525.1	0.2	5.2	
Korean Stock Exch.	KOSPI Index	3,223.0	0.6	12.2	
Straight Times	FSSTI Index	3,161.2	(0.2)	11.2	
Kuala Lumpur	KLCI Index	1,493.0	(0.1)	(8.2)	
Philippines	PCOMP Index	6,446.3	2.8	(9.7)	
Nikkei	NKY Index	27,781.0	1.8	1.2	
Hang Seng	HSI Index	26,235.8	1.1	(3.7)	
MSCI-Asia pacific	MXAP Index	197.3	(1.2)	(1.3)	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,935.5	(0.4)	14.1	
S&P 500	SPX Index	4,395.3	(0.5)	17.0	
Nasdaq	CCMP Index	14,672.7	(0.7)	13.8	
FTSE 100	UKX Index	7,084.6	0.7	9.7	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,423.0	0.3	(2.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,465.0	(0.1)	2.7
3 month	IDSWT3M Index	14,457.9	(0.2)	(2.6)
6 month	IDSWT6M Index	14,462.9	(0.2)	(2.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,498.4	(0.3)	(2.4)
6 month	IDFWT6M Index	14,562.0	(0.2)	(1.0)

*price as of 7/30/2021


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