

FOR PROFESSIONAL INVESTORS - 02/14/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### DOWN

JCI weakened and closed at 6,734 (-81 points or -1.19%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net inflow of IDR 403Bn today and rupiah slightly strengthened to IDR 14,328/USD.

Banking stocks were mostly negative as PNB (-0.63%), BDMN (-1.22%), BBRI (-0.9%), and BBCA (-1.6%) all retreated, except BMRI (+0.97%). Consumer names were mostly negative as ICBP (-1.16%), HMSA (-1.55%), UNVR (-1.28%), and KLBF (-2.14%) all corrected, except GGRM (+1.31%). Material stocks were negative as BRPT (-2.44%) and TPIA (-6.23%) all corrected. Telco names were negative as ISAT (-2.68%), EXCL (-3.25%), and TLKM (-1.12%) all declined. Other movers were SUPR (+19.9%), MEDC (+6.14%), BBYB (-6.99%), and BTPS (-6.88%).

According to Bank Indonesia, as of Jan-22, the value of electronic money transactions grew 66.65% YoY to reach Rp34.6tn. Meanwhile, digital banking transactions rose 62.82% YoY to Rp4314.3tn. BI projects 17%/25% YoY growth for electronic money transactions and digital banking for 2022.

### BOND MARKET

#### LACKLUSTER TRADING

It was dull trading day for bond market with hardly any trade heard done at least from our end. Investors shied away ahead tomorrow auction. The 5Y/10Y/15Y/20Y benchmark closed at mid yield of 5.31%/6.49%/6.46%/6.94%. There will be fresh supply tomorrow as Indonesia Debt Management Office ("DMO") will hold conventional bond auction with IDR 25Tn issuance target. The series that will be issued are 3M SPN, 12M SPN, 5Y FR91, 10Y FR91, 15Y FR93, 20Y FR92 and 30Y FR89. In the previous conventional auction, incoming bids reached IDR 72.07Tn and DMO issued IDR 25Tn.

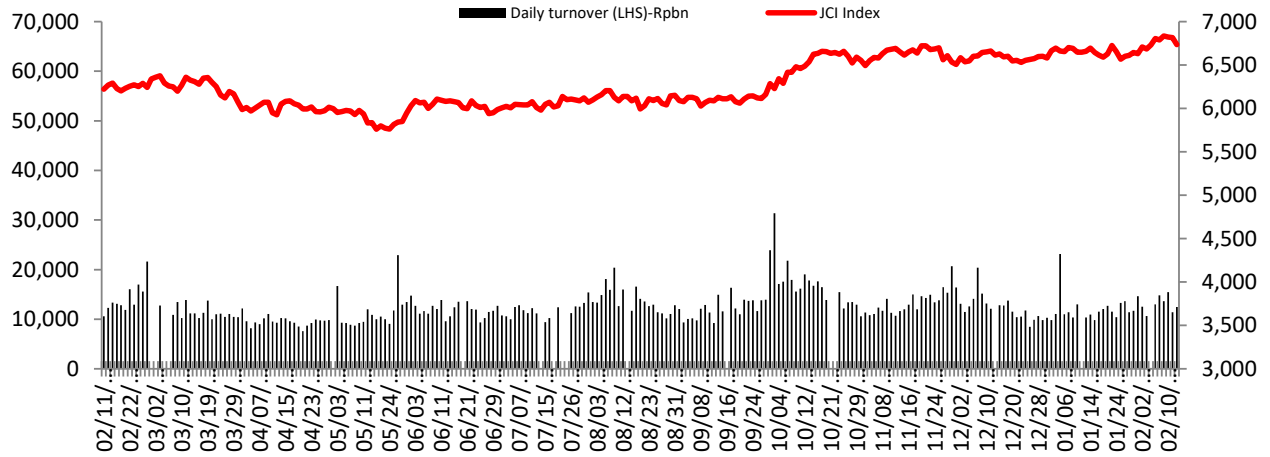


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**ASSET MANAGEMENT**

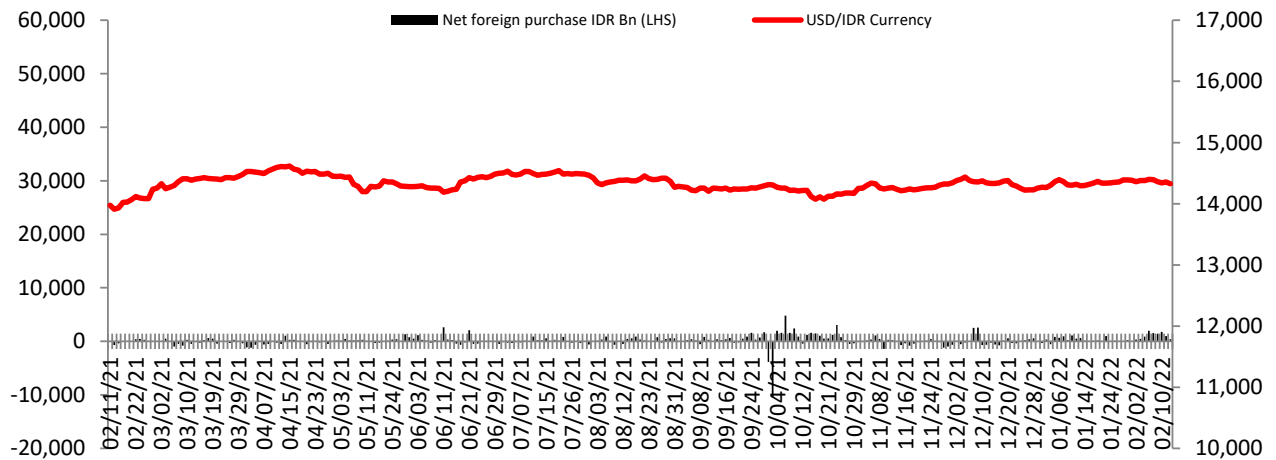
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# GRAPHS & TABLES

## 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	99.2	(0.1)	(1.7)	5Y
FR82	FR0082 Govt	99.1	0.1	(1.7)	10Y
FR80	FR0080 Govt	99.0	(0.1)		15Y
FR83	FR0083 Govt	101.9	0.0	(0.7)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,734.5	(1.2)	2.3	
Thailand	SET Index	1,684.7	(0.9)	1.6	
Korean Stock Exch.	KOSPI Index	2,704.5	(1.6)	(9.2)	
Straight Times	FSSTI Index	3,421.2	(0.2)	9.5	
Kuala Lumpur	KLCI Index	1,583.8	0.3	1.0	
Philippines	PCOMP Index	7,361.2	1.2	3.3	
Nikkei	NKY Index	27,079.6	(2.2)	(5.9)	
Hang Seng	HSI Index	24,556.6	(1.4)	5.0	
MSCI-Asia pacific	MXAP Index	190.5	(0.6)	(1.4)	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,738.1	(1.4)	(4.4)	
S&P 500	SPX Index	4,418.6	(1.9)	(7.3)	
Nasdaq	CCMP Index	13,791.2	(2.8)	(11.8)	
FTSE 100	UKX Index	7,548.9	(1.5)	2.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,328.0	0.2	(0.5)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,357.5	0.1	0.7
3 month	IDSWT3M Index	14,356.0	0.1	(0.6)
6 month	IDSWT6M Index	14,360.0	0.1	(0.7)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,387.8	0.2	(0.6)
6 month	IDFWT6M Index	14,622.3	0.2	(1.7)
			(0.1)	(0.4)

\*price as of 2/12/2022

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