

FOR PROFESSIONAL INVESTORS - 05/10/2023

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Stronger

JCI slightly strengthened and closed at 6,812 (+32 points or +0.47%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 238Bn today and rupiah was stabilized at IDR 14,725/USD.

Banking stocks were mixed as BBRI (+0.49%), BMRI (+0.5%), and BBNI (+0.82%) advanced, while BBTN (-0.77%) and MEGA (-0.4%) retreated. Consumer names were mixed as UNVR (+2.51%), INDF (+1.1%), and GGRM (+3.38%) in green, while SIDO (-3.13%) and ICBP (-0.91%) closed lower. Material stocks were positive as TPIA (+1.33%) and BRPT (+1.23%) all advanced. Retailer names were negative as ACES (-0.9%), MAPA (-1.46%), MAPI (-1.25%), and AMRT (-1.02%) all retreated. Other movers were TBIG (+3.48%), ADRO (+1.73%), BBKP (-6.42%), and BTPS (-5.63%).

Indonesia's govt. debt stood at IDR7.879tn in Mar'23 (39.2% GDP), the number posed small uptick from Feb'23 IDR7.862tn.

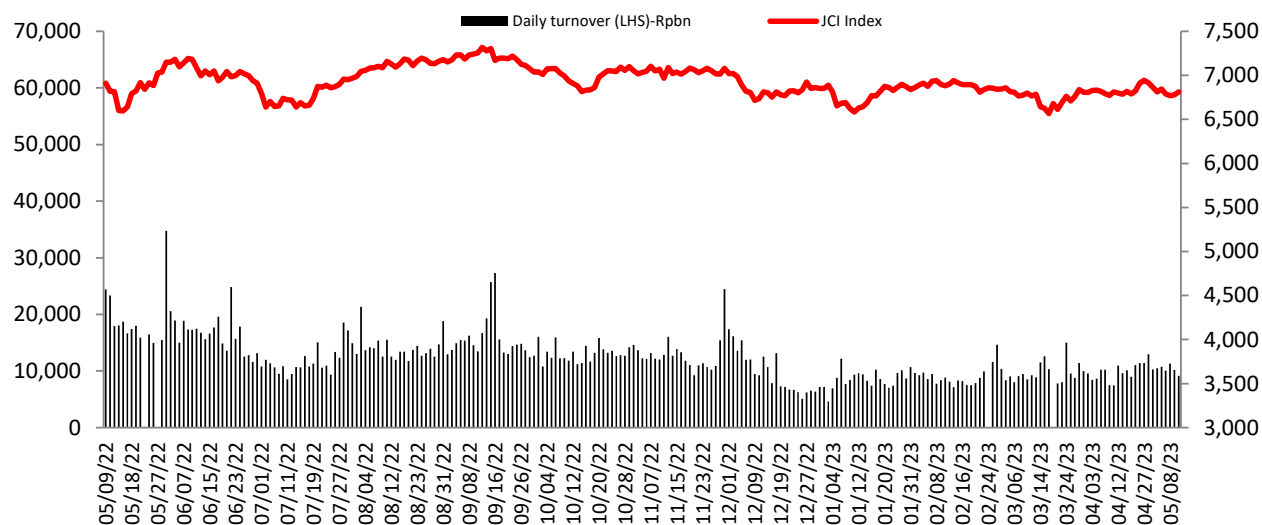
### BOND MARKET

#### EXTENDED BUYING

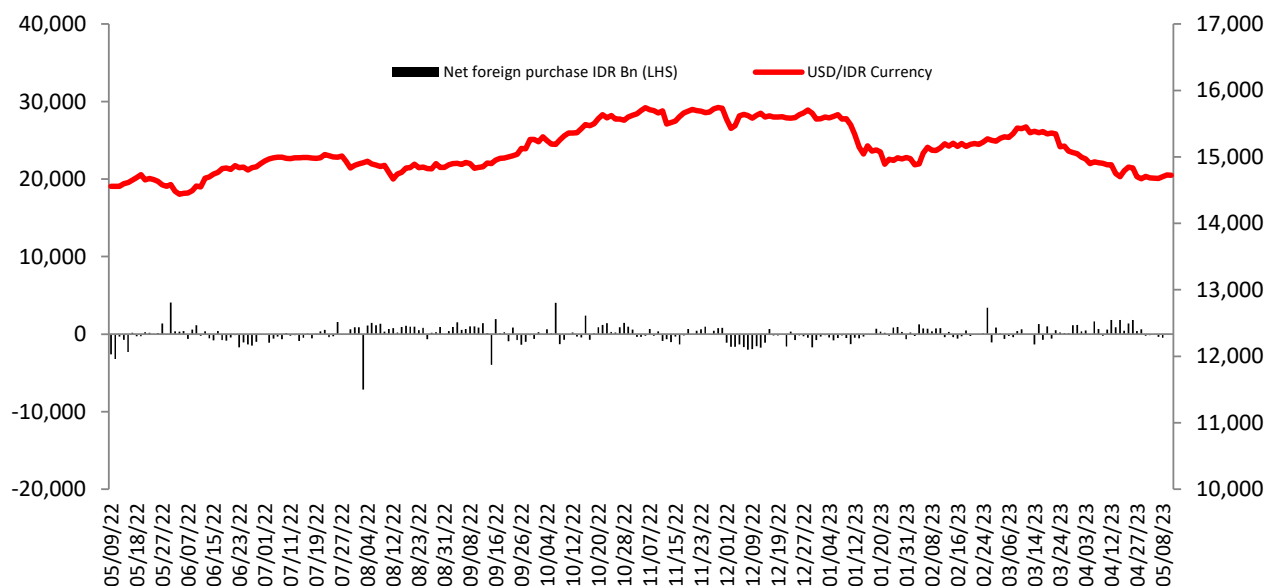
The bond market advanced further today on the back of solid interest from both onshore and offshore players. Buying boosted prices level specially on 5Y and below. Positive sentiment supports expected the coming giant maturity of FR63 and PBS27 totaling IDR 142 Tn. Market still strong on bond market despite tonight US CPI data release. However nearing end of trading day, small taking profit action was seen in the market. Market closed with yields lower by 5 – 10 bps compared to yesterday closing level. The 5Y/10Y/15Y/20Y benchmark closed the day at mid-yield of 6.12%/6.43%/6.71%/6.81%.

## 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    | 101.0    | 0.1        | 1.9        | 5Y    |
| FR82                  | FR0082 Govt    | 103.9    | 0.1        | 3.4        | 10Y   |
| FR80                  | FR0080 Govt    | 103.4    | 0.1        | 2.9        | 15Y   |
| FR83                  | FR0083 Govt    | 103.2    | 0.2        | 3.0        | 20Y   |
| <u>Asia Pacific</u>   |                |          |            |            |       |
| Jakarta Composite     | JCI Index      | 6,811.9  | 0.5        | (0.6)      |       |
| Thailand              | SET Index      | 1,567.1  | 0.2        | (6.1)      |       |
| Korean Stock Exch.    | KOSPI Index    | 2,496.5  | (0.5)      | 11.6       |       |
| Straight Times        | FSSTI Index    | 3,241.4  | (0.0)      | (0.3)      |       |
| Kuala Lumpur          | KLCI Index     | 1,425.7  | (0.5)      | (4.7)      |       |
| Philippines           | PCOMP Index    | 6,658.6  | 0.5        | 1.4        |       |
| Nikkei                | NKY Index      | 29,122.2 | (0.4)      | 11.6       |       |
| Hang Seng             | HSI Index      | 19,762.2 | (0.5)      | (0.1)      |       |
| MSCI-Asia pacific     | MXAP Index     | 162.4    | (0.2)      | 4.2        |       |
| <u>Global Indices</u> |                |          |            |            |       |
| Dow Jones             | INDU Index     | 33,561.8 | (0.2)      | 1.3        |       |
| S&P 500               | SPX Index      | 4,119.2  | (0.5)      | 7.3        |       |
| Nasdaq                | CCMP Index     | 12,179.6 | (0.6)      | 16.4       |       |
| FTSE 100              | UKX Index      | 7,747.7  | (0.2)      | 4.0        |       |

|                    | Bloomberg Code | IDR      | % Chg. D-D | % Chg. YTD |
|--------------------|----------------|----------|------------|------------|
| Spot IDR           | IDR Curncy     | 14,725.0 | 0.0        | 5.7        |
| <u>Swap-IDR</u>    |                |          |            |            |
| 1 month            | IDSWT1M Index  | 14,710.4 | 0.1        | (6.4)      |
| 3 month            | IDSWT3M Index  | 14,751.7 | 0.3        | 5.3        |
| 6 month            | IDSWT6M Index  | 14,744.6 | 0.3        | 5.4        |
| <u>Forward-IDR</u> |                |          |            |            |
| 3 month            | IDFWT3M Index  | 14,769.6 | 0.4        | 5.2        |
| 6 month            | IDFWT6M Index  | 14,788.0 | 0.4        | 5.5        |
|                    |                |          | (0.1)      |            |

\*price as of 5/9/2023


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