



FOR PROFESSIONAL INVESTORS - 05/05/2023

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

REBOUNDED

JCI slightly strengthened and closed at 6,844 (+31 points or +0.46%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 60Bn today and rupiah was stabilized at IDR 14,680/USD.

Banking stocks were mixed as BBRI (+0.98%) and BBCA (+0.84%) in green, while MEGA (-0.6%), BBNI (-1.85%), and BMRI (-0.96%) closed lower. Consumer names were mostly positive as KLBK (+1.46%), UNVR (+1.14%), MYOR (+1.53%), and ICBP (+0.47%) all rose, except INDF (-0.38%). Cement stocks were mixed as SMGR (+3.48%) and SMCB (+10.36%) in green, while INTP and SMBR unchanged. Mining names were mostly negative as INDY (-2.94%), ITMG (-1.81%), ADRO (-0.68%), and PTBA (-5.01%) all down, except INCO (+1.81%). Other movers were BTPS (+5%), TOWR (+3.57%), TKIM (-4.88%), and MEDC (-3.72%).

Indonesian mall operators said this was due to a soaring number of travelers and the easing of public activity restrictions (PPKM). "The average visit rate to shopping centers during Ramadan and the Idul Fitri holiday this year amounted to 120 percent-130 percent of the 2019 figure

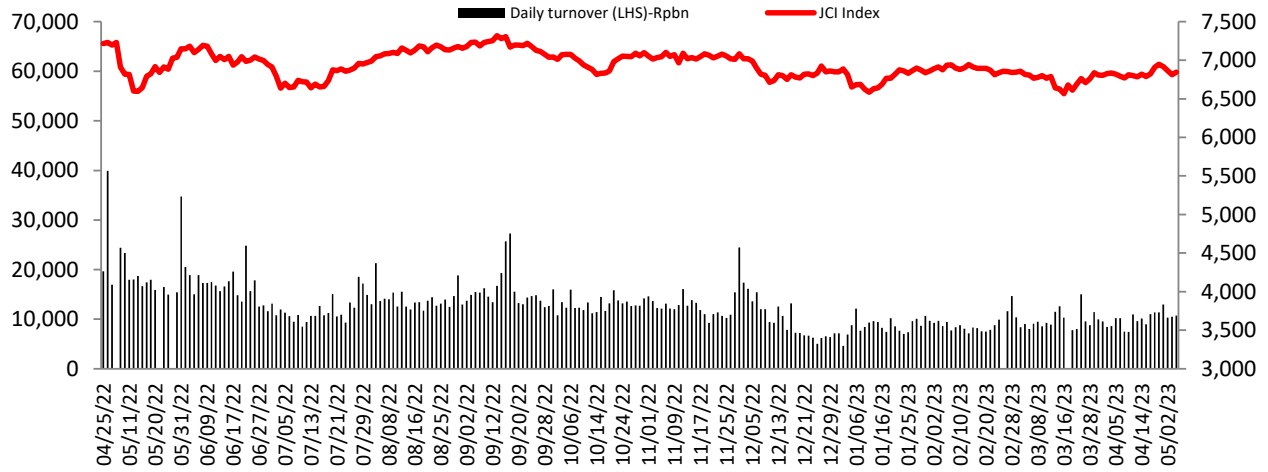
BOND MARKET

POSITIVE SENTIMENT

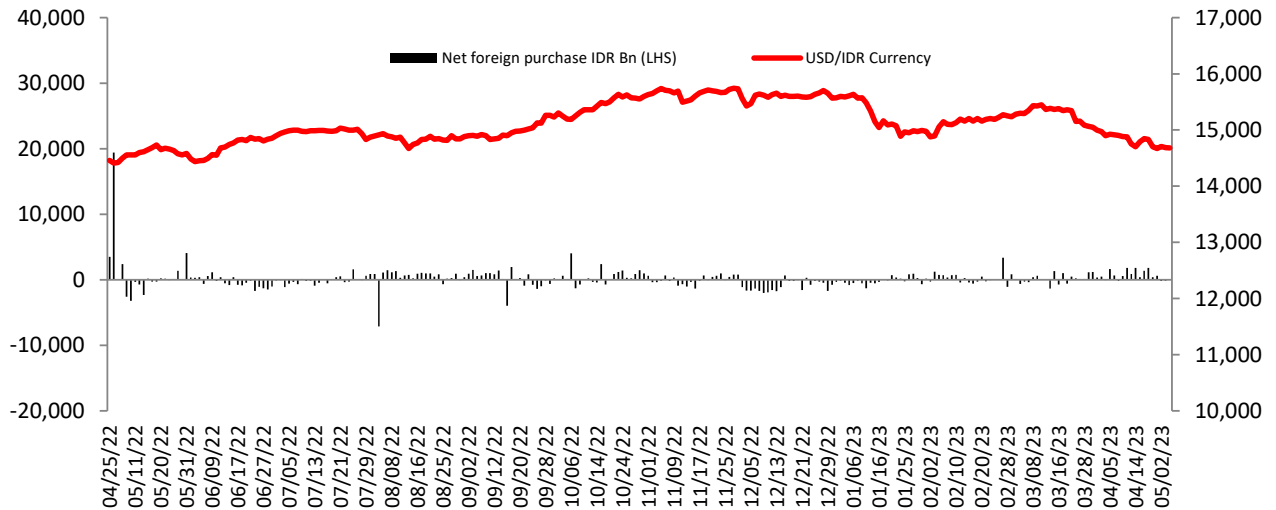
Indonesia bond market opened bullish today on the back of positive sentiment post Fed's meeting last night as Fed delivered 25 bps hike. Market players were keen hunting mostly still on mid to long end tenor. Meanwhile, in the afternoon session, bond market took a u turn seems triggered by higher USDIDR. Today we see foreign names tracked on buying action and local players seemed to be ready to take profit. However, this profit taking action failed to capped the bond prices. The 10Y FR96 and 15Y FR75 taken as high as 104.6 (6.358%) and 106.35 (6.817%).

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	101.1	0.3	2.0	5Y
FR82	FR0082 Govt	104.3	0.4	3.7	10Y
FR80	FR0080 Govt	103.4	0.3	2.9	15Y
FR83	FR0083 Govt	103.1	0.4	3.0	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,844.0	0.5	(0.1)	
Thailand	SET Index	1,533.3	0.3	(8.1)	
Korean Stock Exch.	KOSPI Index	2,500.9	(0.0)	11.8	
Straight Times	FSSTI Index	3,269.2	0.2	0.5	
Kuala Lumpur	KLCI Index	1,426.0	(0.0)	(4.6)	
Philippines	PCOMP Index	6,684.4	1.2	1.8	
Nikkei	NKY Index	29,158.0	0.1	11.7	
Hang Seng	HSI Index	19,948.7	1.3	0.8	
MSCI-Asia pacific	MXAP Index	160.6	(0.1)	3.1	
<u>Global Indices</u>					
Dow Jones	INDU Index	33,414.2	(0.8)	0.8	
S&P 500	SPX Index	4,090.8	(0.7)	6.5	
Nasdaq	CCMP Index	12,025.3	(0.5)	14.9	
FTSE 100	UKX Index	7,744.3	(0.6)	3.9	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,680.0	0.0	6.0
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,645.0	(0.6)	(6.9)
3 month	IDSWT3M Index	14,705.4	0.0	5.6
6 month	IDSWT6M Index	14,699.0	(0.4)	5.7
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,724.9	0.1	5.4
6 month	IDFWT6M Index	14,719.4	(0.6)	5.9

*price as of 5/3/2023

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