

FOR PROFESSIONAL INVESTORS - 08/30/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

RECOVER

JCI advanced and closed at 6,145 (+104 points or +1.71%) today. Shares across regional markets were positive. Meanwhile, foreign investors recorded net inflow of IDR 568Bn today and rupiah slightly strengthened to IDR 14,370/USD.

Banking stocks were positive as BBRI (+2.6%), BMRI (+2.59%), BBCA (+0.84%), BBNI (+1.89%), and PNB (+1.97%) all advanced. Consumer names were positive as UNVR (+2.48%), ICBP (+3.61%), HMSP (+3.16%), KLBF (+2.2%), and GGRM (+2.11%) all up. Infra stocks were positive as TBIG (+4.79%), TOWR (+3.46%), PGAS (+1.98%), and JSMR (+1.59%) all inched higher. Mining names were positive as ADRO (+4.42%), ANTM (+2.21%), INCO (+2.32%), ITMG (+3.61%), and PTBA (+1.44%) all closed higher. Other movers were INKP (+9.56%), AGRO (+6.76%), PALM (-6.79%), and TURI (-6.69%).

OJK is preparing new regulations for fintech players so that the portion of financing services to outside Java is wider. One of them is that each platform must distribute at least 20% of its total annual funding distribution to outside Java.

BOND MARKET

LOWER YIELD

Indonesia bond market start the week with bullish tone after last Friday's Jackson Hole event. As soon as market opened, high interest was seen led by 10Y areas. Mixed players was seen buying not only the benchmark series, but also non benchmark series. Significant price increase soon invited profit takers in market. Market closed with yields lower by 7 – 9 bps compared to last Friday closing level with 5Y/10Y/15Y/20Y closed at mid yield 5.03%/6.09%/6.29%/6.88%.

There will be fresh supply tomorrow as Indonesia Debt Management Office ("DMO") will hold conventional bond auction with lower issuance target at IDR 21Tn. 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 77.07Tn and DMO issued IDR 30Tn.

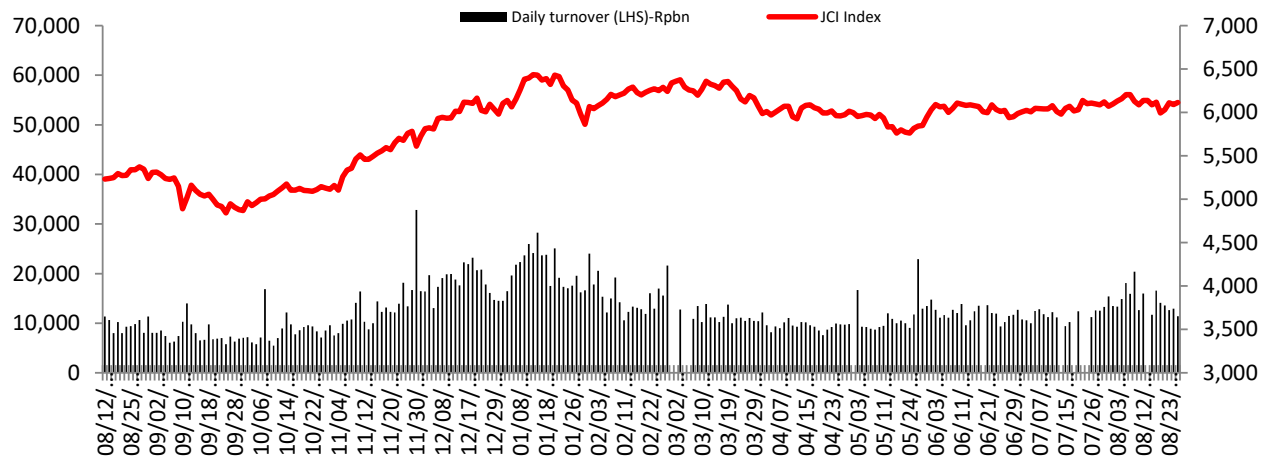


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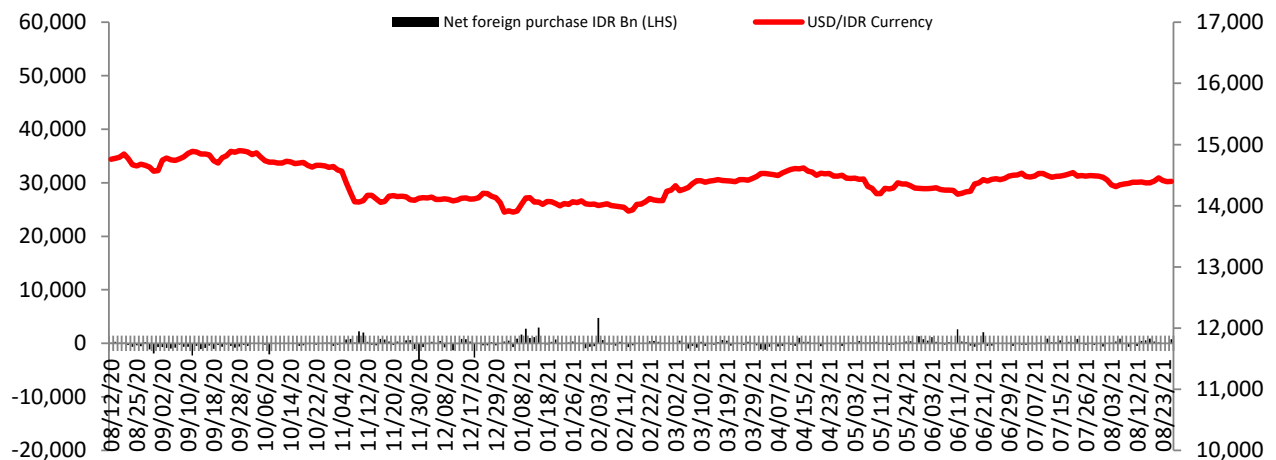
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GRAPHS & TABLES

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	101.9	0.1	0.2	5Y
FR82	FR0082 Govt	102.8	0.3	(1.9)	10Y
FR80	FR0080 Govt	99.5	0.1		15Y
FR83	FR0083 Govt	106.4	0.3	(3.9)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,144.9	1.7	2.8	
Thailand	SET Index	1,633.8	1.4	12.7	
Korean Stock Exch.	KOSPI Index	3,144.2	0.3	9.4	
Straight Times	FSSTI Index	3,102.1	0.7	9.1	
Kuala Lumpur	KLCI Index	1,601.4	0.7	(1.6)	
Philippines	PCOMP Index	6,786.6	(0.5)	(4.9)	
Nikkei	NKY Index	27,789.3	0.5	1.3	
Hang Seng	HSI Index	25,539.5	0.5	(6.2)	
MSCI-Asia pacific	MXAP Index	197.4	0.1	(1.3)	
<u>Global Indices</u>					
Dow Jones	INDU Index	35,455.8	0.7	15.8	
S&P 500	SPX Index	4,509.4	0.9	20.1	
Nasdaq	CCMP Index	15,129.5	1.2	17.4	
FTSE 100	UKX Index	7,148.0	0.3	10.6	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,370.0	0.3	(2.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,429.1	0.0	2.4
3 month	IDSWT3M Index	14,426.8	0.0	(2.4)
6 month	IDSWT6M Index	14,424.4	0.0	(2.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,478.2	0.1	(2.3)
6 month	IDFWT6M Index	14,537.9	0.0	(0.9)
			(0.0)	

*price as of 8/26/2021


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