

FOR PROFESSIONAL INVESTORS - 07/23/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

ADJUSTED DOWN

JCI weakened and closed at 6,102 (-36 points or -0.58%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 117Bn today and rupiah was stabilized at IDR 14,493/USD.

Banking stocks were mostly negative as BBNI (-1.46%), BMRI (-1.24%), BBRI (-0.77%), and BBKA (-1.95%) all retreated, except PNB (+3.92%). Consumer names were negative as KLB (-0.74%), MYOR (-2.18%), ICBP (-1.98%), HMSP (-1.74%), and UNVR (-4.48%) all down. Poultry stocks were negative as MAIN (-3.45%), JPFA (-2.32%), and CPIN (-3.49%) all down. Material names were negative as TPIA (-1.41%) and BRPT (-2.99%) all weakened. Other movers were MASA (+25%), BSIM (+24.86%), MAYA (-5.97%), and SMMA (-3.98%).

Bank Indonesia maintains the BI7DRR at 3.5%, deposit facility at 2.75% and lending facility at 4.25%.

BOND MARKET

FLAT

Indonesia bond market closed the week relatively flat today. We saw mixed trading although bond market general direction was offerish with several profit takers came to market. However, there was no significant price movement in the market with only limited trading was seen. Market was mostly dominated by local banks. The 5Y/10Y/15Y/20Y benchmark closed the week at mid-yield of 5.26%/6.3%/6.40%/7.08%. Yields were higher by around 1 – 4 bps across the curve.

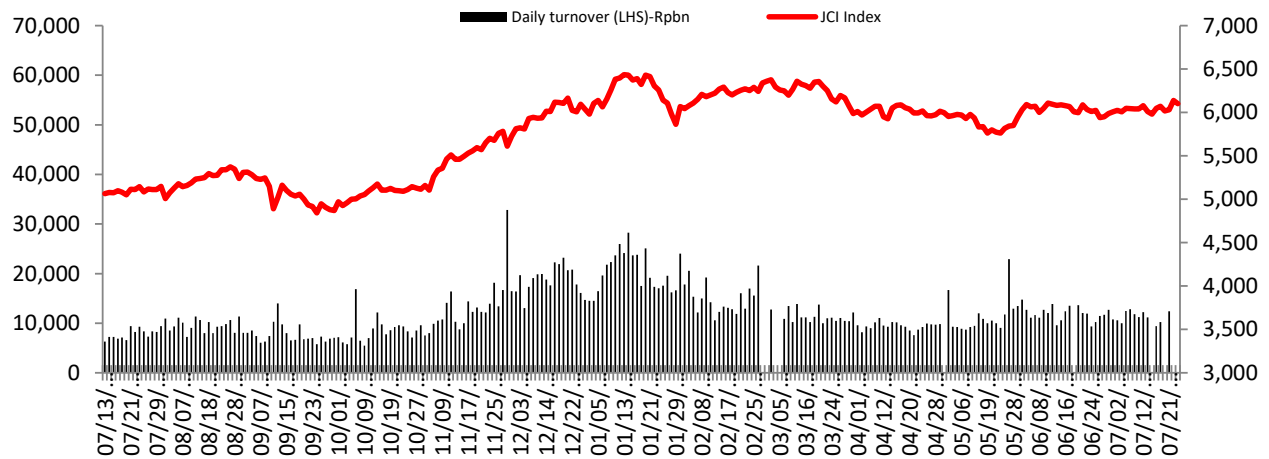


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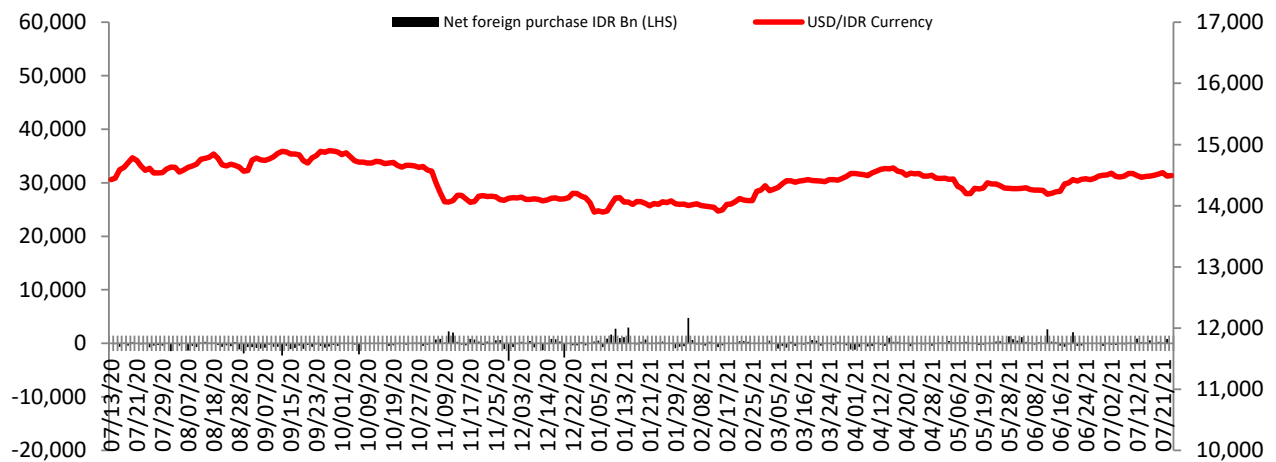
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GRAPHS & TABLES

JCI & DAILY TURNOVER



IDR & NET FOREIGN PURCHASES



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EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
<u>Bonds</u>					
FR81	FR0081 Govt	101.1	0.0	(0.6)	5Y
FR82	FR0082 Govt	101.5	(0.0)	(3.1)	10Y
FR80	FR0080 Govt	98.8	0.0		15Y
FR83	FR0083 Govt	104.3	(0.0)	(5.9)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,101.7	(0.6)	2.1	
Thailand	SET Index	1,545.1	(0.5)	6.6	
Korean Stock Exch.	KOSPI Index	3,254.4	0.1	13.3	
Straight Times	FSSTI Index	3,157.1	(0.1)	11.0	
Kuala Lumpur	KLCI Index	1,523.4	(0.3)	(6.4)	
Philippines	PCOMP Index	6,520.7	(0.8)	(8.7)	
Nikkei	NKY Index	27,548.0	0.6	0.4	
Hang Seng	HSI Index	27,322.0	(1.4)	0.3	
MSCI-Asia pacific	MXAP Index	202.8	0.9	1.5	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,823.4	0.1	13.8	
S&P 500	SPX Index	4,367.5	0.2	16.3	
Nasdaq	CCMP Index	14,684.6	0.4	13.9	
FTSE 100	UKX Index	7,025.3	0.8	8.7	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,493.0	(0.1)	(3.1)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,550.0	0.2	3.3
3 month	IDSWT3M Index	14,510.5	(0.3)	(3.0)
6 month	IDSWT6M Index	14,498.4	(0.4)	(2.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,537.1	(0.4)	(2.7)
6 month	IDFWT6M Index	14,614.7	(0.5)	(1.4)

*price as of 7/22/2021


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