



FOR PROFESSIONAL INVESTORS - 08/24/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

INCHED UP

JCI slightly strengthened and closed at 7,195 (+31 points or +0.44%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 815Bn today and rupiah was stabilized at IDR 14,848/USD.

Banking stocks were mixed as BBKA (+0.63%), MEGA (+2.45%), and PNB (+4.88%) inched higher, while BBTN (-0.66%) and BBRI (-0.23%) closed lower. Consumer names were mixed as UNVR (+0.83%) and KAEF (+4.23%) up, while ICBP (-0.28%), MYOR (-1.05%), and KLBF (-0.62%) down. Material stocks were negative as TPIA (-1.24%) and BRPT (-3.35%) all corrected. Telco names were mixed as TLKM (+1.93%) and EXCL (+0.38%) rose, while FREN (-3.03%) closed lower. Other movers were BYAN (+3.58%), ESSA (+2.82%), ENRG (-5.93%), and AMRT (-4.29%).

Banking intermediation continues to improve and supports economic recovery. Bank Indonesia recorded credit growth as of July 2022 of 10.71% YoY. This realization was higher than the previous month which grew by 10.66% YoY.

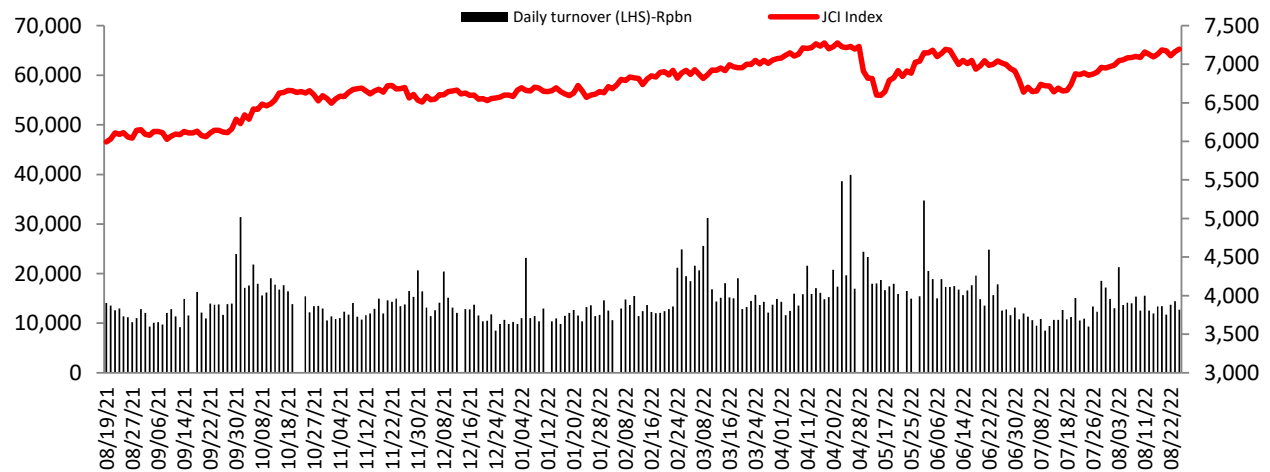
BOND MARKET

MIXED FLOW

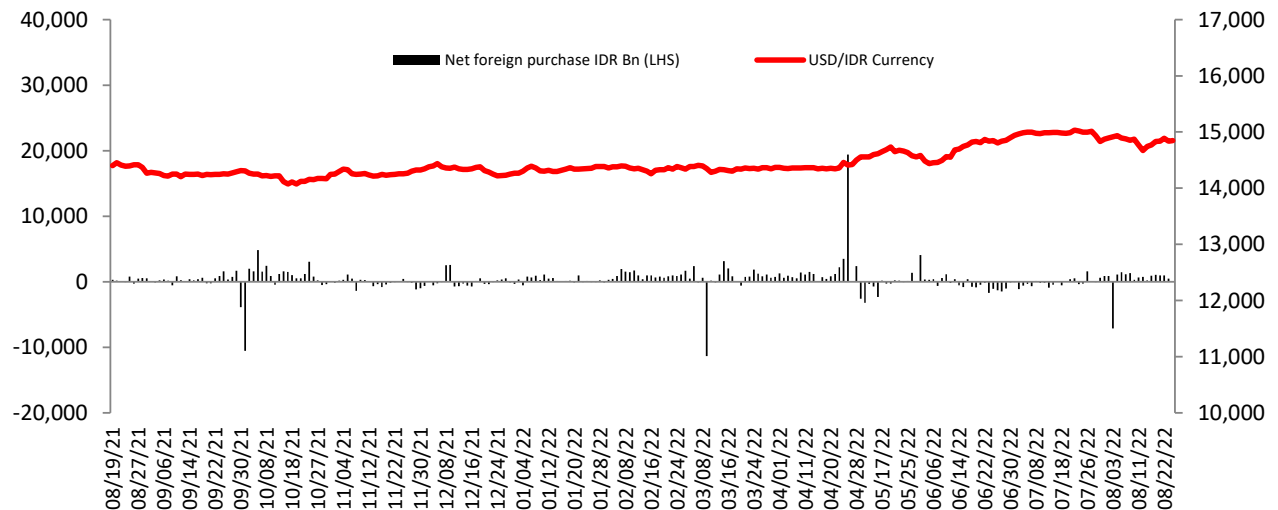
After BI announced 25bps surprise rate hike yesterday, Indonesia bond market continued to open with a bullish tone today. Mixed players show their interest on benchmark and non-benchmark series in what suspected to be position-covering. Unfortunately, the demand did not last long as some profit takers emerged to secondary market. The short and middle tenor remained as market favorites. The 5Y/10Y/15Y/20Y benchmark closed at mid-yield of 6.56%/7.03%/7.03%/7.12%

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	94.3	(0.2)	(6.6)	5Y
FR82	FR0082 Govt	95.4	0.4	(5.4)	10Y
FR80	FR0080 Govt	93.9	0.1		15Y
FR83	FR0083 Govt	99.9	0.2	(2.7)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,194.7	0.4	9.3	
Thailand	SET Index	1,637.5	0.2	(1.2)	
Korean Stock Exch.	KOSPI Index	2,447.5	0.5	(17.8)	
Straight Times	FSSTI Index	3,233.9	(0.4)	3.5	
Kuala Lumpur	KLCI Index	1,468.4	(1.0)	(6.3)	
Philippines	PCOMP Index	6,643.5	0.4	(6.7)	
Nikkei	NKY Index	28,313.5	(0.5)	(1.7)	
Hang Seng	HSI Index	19,268.7	(1.2)	(17.6)	
MSCI-Asia pacific	MXAP Index	158.7	(0.6)	(17.8)	
<u>Global Indices</u>					
Dow Jones	INDU Index	32,909.6	(0.5)	(9.4)	
S&P 500	SPX Index	4,128.7	(0.2)	(13.4)	
Nasdaq	CCMP Index	12,381.3	(0.0)	(20.9)	
FTSE 100	UKX Index	7,446.2	(0.6)	0.8	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,848.0	(0.1)	(4.0)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,821.3	0.5	3.9
3 month	IDSWT3M Index	14,884.9	(0.0)	(4.3)
6 month	IDSWT6M Index	14,898.7	0.1	(4.4)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,923.0	0.1	(4.3)
6 month	IDFWT6M Index	14,938.1	0.2	(3.8)
				(3.5)

*price as of 8/24/2022


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