



FOR PROFESSIONAL INVESTORS - 06/29/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

DECLINE FOR 3 STRAIGHT DAY

JCI weakened and closed at 6,942 (-54 points or -0.77%) today. Shares across regional markets were negative. Meanwhile, foreign investors recorded net outflow of IDR - 1.1Tn today and rupiah was stabilized at IDR 14,850/USD.

Banking stocks were negative as BBTN (-1.67%), BBNI (-0.62%), BBKA (-0.34%), BMRI (-2.15%), and BBRI (-2.79%) all retreated. Consumer names were mostly negative as GGRM (-1.44%), KLBF (-0.59%), UNVR (-2.18%), and INDF (-2.07%) all declined, except MYOR (+4.93%). Material stocks were negative as BRPT (-1.94%) and TPIA (-2.91%) all down. Infra names were negative as PGAS (-0.89%), JSMR (-2.43%), TOWR (-0.95%), and TBIG (-1.37%) all weakened. Other movers were IBST (+19.93%), RISE (+9.68%), UNTR (-4.28%), and TCPI (-3.45%).

Tax amnesty program on income tax breaches IDR43.17tn. Total income of IDR424.87tn was disclosed. (Kontan)

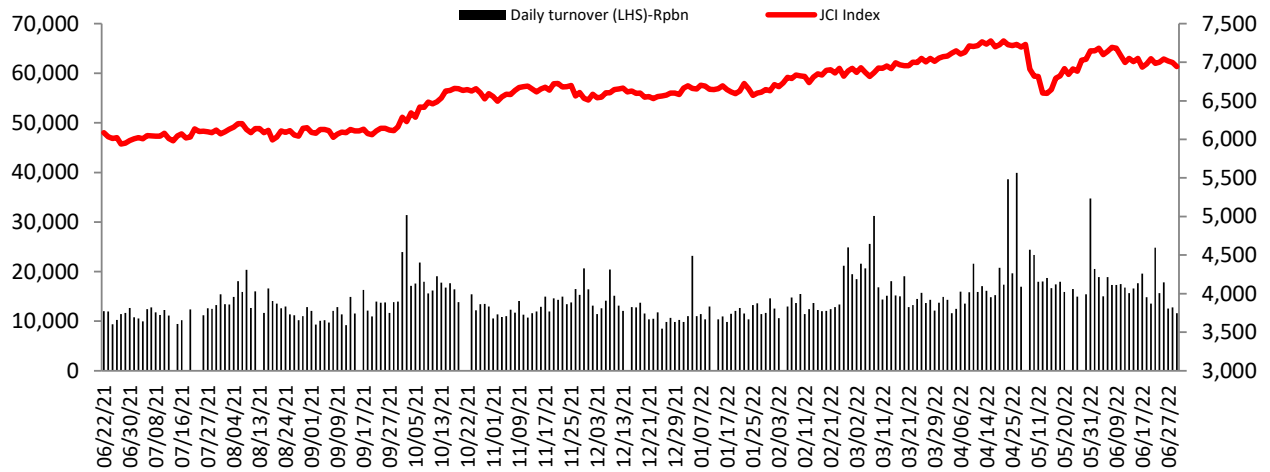
BOND MARKET

SLIGHTLY HIGHER

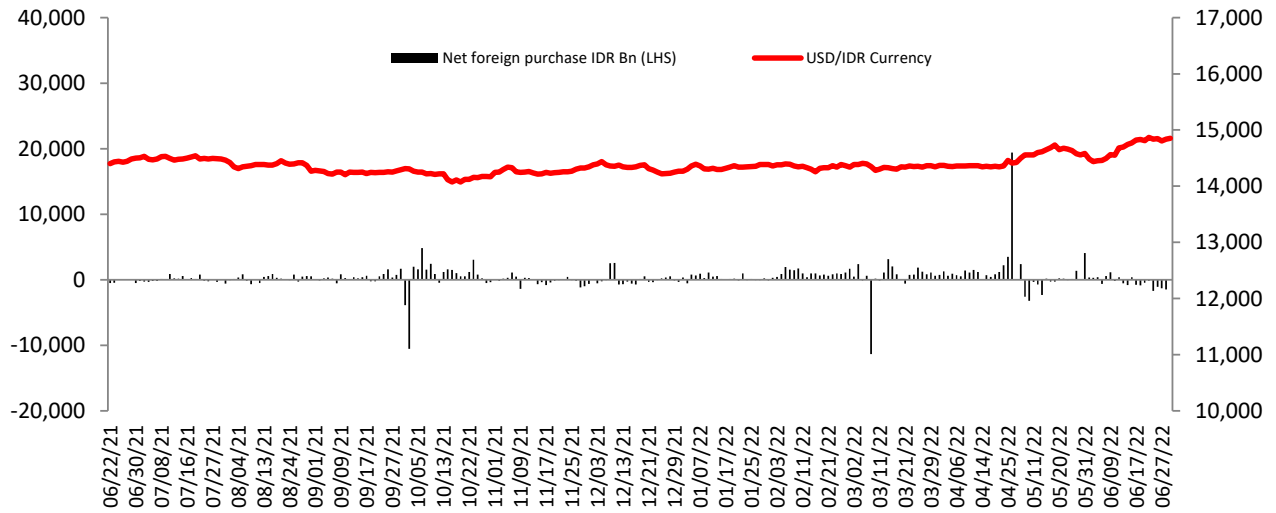
The bond market opened firmer today and prices ended higher on the back of onshore inflow. Biddish tone from mixed names were seen on the front to belly part of the curve, which pushed 10Y FR91 prices to as high as 93.95 (7.24%). As usual the positive price action got interrupted by profit takers, however solid bid which was suspected posted by local banks lend some support to the market. Market closed with yields lower by 3 – 8 bps compared to yesterday closing level.

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	95.5	0.1	(5.4)	5Y
FR82	FR0082 Govt	93.8	0.2	(6.9)	10Y
FR80	FR0080 Govt	91.5	0.0		15Y
FR83	FR0083 Govt	98.8	0.1	(3.7)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,942.4	(0.8)	5.5	
Thailand	SET Index	1,585.9	(0.5)	(4.3)	
Korean Stock Exch.	KOSPI Index	2,378.0	(1.8)	(20.1)	
Straight Times	FSSTI Index	3,144.1	0.1	0.7	
Kuala Lumpur	KLCI Index	1,452.2	(0.2)	(7.4)	
Philippines	PCOMP Index	6,303.2	(0.7)	(11.5)	
Nikkei	NKY Index	26,804.6	(0.9)	(6.9)	
Hang Seng	HSI Index	21,996.9	(1.9)	(6.0)	
MSCI-Asia pacific	MXAP Index	162.1	0.3	(16.1)	
<u>Global Indices</u>					
Dow Jones	INDU Index	30,947.0	(1.6)	(14.8)	
S&P 500	SPX Index	3,821.6	(2.0)	(19.8)	
Nasdaq	CCMP Index	11,181.5	(3.0)	(28.5)	
FTSE 100	UKX Index	7,285.9	(0.5)	(1.3)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,850.0	(0.1)	(4.0)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,837.0	0.2	4.1
3 month	IDSWT3M Index	14,805.0	(0.3)	(3.7)
6 month	IDSWT6M Index	14,828.0	(0.1)	(3.9)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,833.2	0.2	(3.7)
6 month	IDFWT6M Index	14,865.5	(0.2)	(3.3)
			(0.1)	(5.2)

*price as of 6/29/2022

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