

FOR PROFESSIONAL INVESTORS - 08/19/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Lower on Close

JCI advanced and closed at 7,187 (+53 points or +0.74%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 949Bn today and rupiah slightly weakened to IDR 14,833/USD.

Banking stocks were positive as BBRI (+1.17%), BMRI (+0.88%), BBKA (+0.31%), BBNI (+0.87%), and MEGA (+0.49%) all advanced. Consumer names were positive as HMSP (+1.65%), UNVR (+0.42%), INDF (+0.38%), ICBP (+0.29%), and SIDO (+0.65%) all closed higher. Poultry stocks were positive as CPIN (+3.95%), JPFA (+7.31%), and MAIN (+3.2%) all inched higher. Telco names were mixed as TLKM (+3.17%) closed higher, while EXCL (-1.52%) and FREN (-3.64%) closed lower. Other movers were BMTR (+7.69%), BHIT (+6.06%), PANI (-7%), and LPPF (-3.85%).

Bank Indonesia (BI) signaled that it would maintain a low interest rate at the level of 3.5% at the Board of Governors' Meeting (RDG), Aug-22, with reason that the national economy is still stable so far.

BOND MARKET

SOFTER

Indonesia bond market closed the week muted and on somber mood as investors closely watching UST movement. Limited trading heard in the morning session as market still on selling mode and bond market managed to end lower. Selling interest on 10Y benchmark and new series lowered prices by 25 – 50 bps with higher yield around 6 to 9 bps compared to yesterday closing. The mid-yield of benchmark series closed with 5/10/15/20years ended at 6.4%/7.12%/7.04%/7.14% respectively.

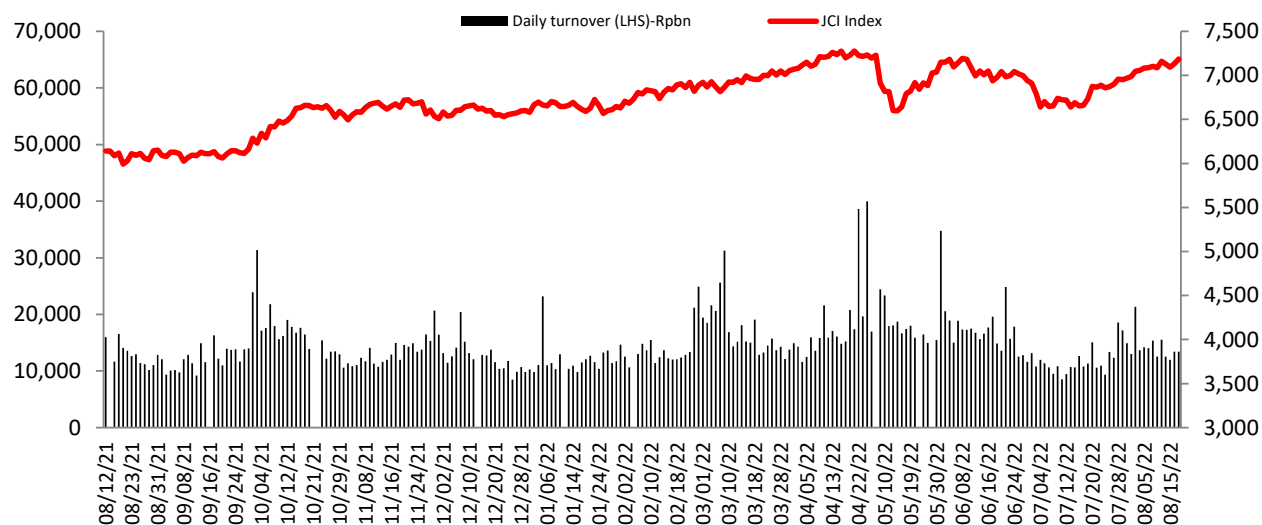


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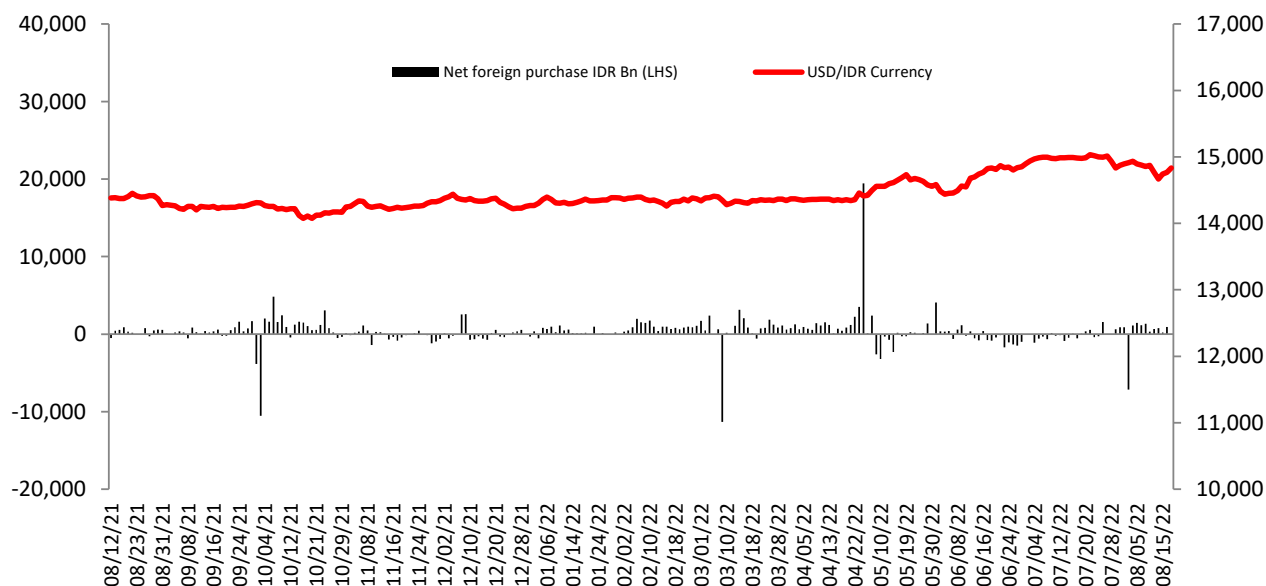
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GRAPHS & TABLES

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	95.1	0.1	(5.8)	5Y
FR82	FR0082 Govt	95.5	(0.2)	(5.3)	10Y
FR80	FR0080 Govt	94.2	(0.2)		15Y
FR83	FR0083 Govt	100.2	0.1	(2.3)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,186.6	0.7	9.2	
Thailand	SET Index	1,634.8	(0.3)	(1.4)	
Korean Stock Exch.	KOSPI Index	2,508.1	(0.3)	(15.8)	
Straight Times	FSSTI Index	3,272.3	0.3	4.8	
Kuala Lumpur	KLCI Index	1,516.6	(0.1)	(3.2)	
Philippines	PCOMP Index	6,824.6	0.1	(4.2)	
Nikkei	NKY Index	28,942.1	(1.0)	0.5	
Hang Seng	HSI Index	19,763.9	(0.8)	(15.5)	
MSCI-Asia pacific	MXAP Index	163.0	0.1	(15.6)	
<u>Global Indices</u>					
Dow Jones	INDU Index	33,980.3	(0.5)	(6.5)	
S&P 500	SPX Index	4,274.0	(0.7)	(10.3)	
Nasdaq	CCMP Index	12,938.1	(1.3)	(17.3)	
FTSE 100	UKX Index	7,505.5	(0.1)	1.6	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,833.0	(0.4)	(3.9)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,750.0	(0.4)	3.4
3 month	IDSWT3M Index	14,765.2	0.2	(3.4)
6 month	IDSWT6M Index	14,755.9	0.2	(3.4)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,792.0	0.3	(3.4)
6 month	IDFWT6M Index	14,788.0	0.3	(2.8)
				(2.9)

*price as of 8/18/2022


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