



FOR PROFESSIONAL INVESTORS - 07/21/2023

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

RECOVER

JCI slightly strengthened and closed at 6,864 (+34 points or +0.5%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 497Bn today and rupiah was stabilized at IDR 14,988/USD.

Banking stocks were mixed as BMRI (+3.27%), BBNi (+1.69%), PNBn (+0.41%), and BDMN (+0.64%) advanced, while BBCA unchanged. Consumer names were mostly negative as MYOR (-2.06%), UNVR (-1.17%), ICBP (-2.34%), and KLBF (-2.5%) all corrected, except GGRM (+1.88%). Properties stocks were positive as BSDE (+4.89%), CTRA (+3.69%), PWON (+2.89%), and SMRA (+2.19%) all up. Retailer names were mostly positive as AMRT (+1.82%), MAPI (+4.47%), and MAPA (+1.42%) all rose, except ACES (-7.33%). Other movers were BTPS (+5.94%), MDKA (+5.7%), ESSA (-2.86%), and CPIN (-2.35%)."

Ministry of Finance has officially released new regulation regarding export duties for the export of mineral concentrate products (PMK No.7/2023, replacing PMK No.39/2022). With the new regulation, the gov't will impose export duties for the export of mineral concentrate products for companies whose smelter construction has reached >50% in return for obtaining export permits relaxation

BOND MARKET

QUIET MARKET

Indonesia bond market was calm today. Only few trades were seen throughout the day with light trading volume. Although the overall market tone was mixed, no significant price action took place. IDR bond the prices ended the day unchanged from yesterday level. The yield of 5/10/15/20Y benchmark closed the day at mid-yield of 5.87%/6.19%/6.33%/6.42% respectively

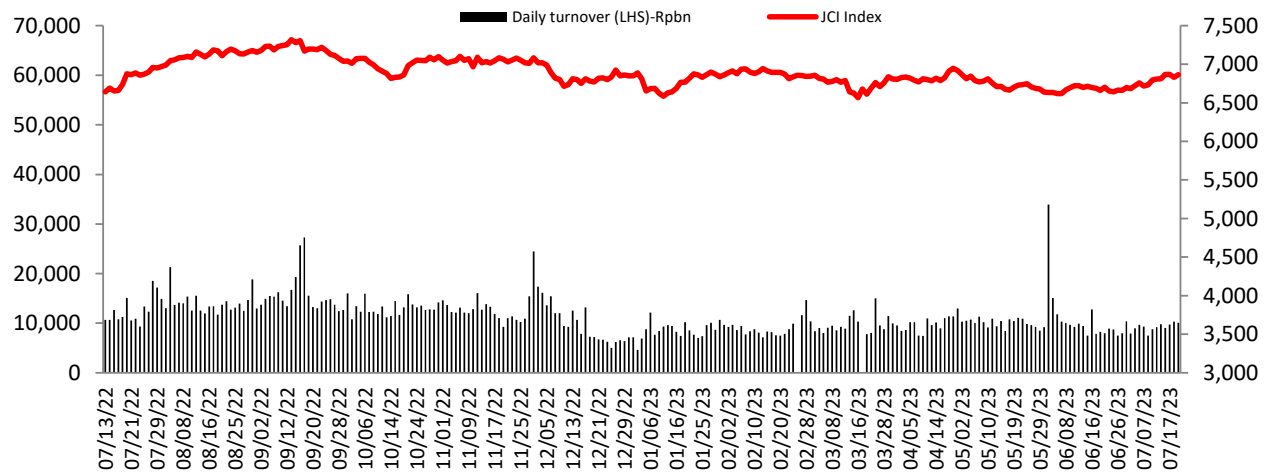


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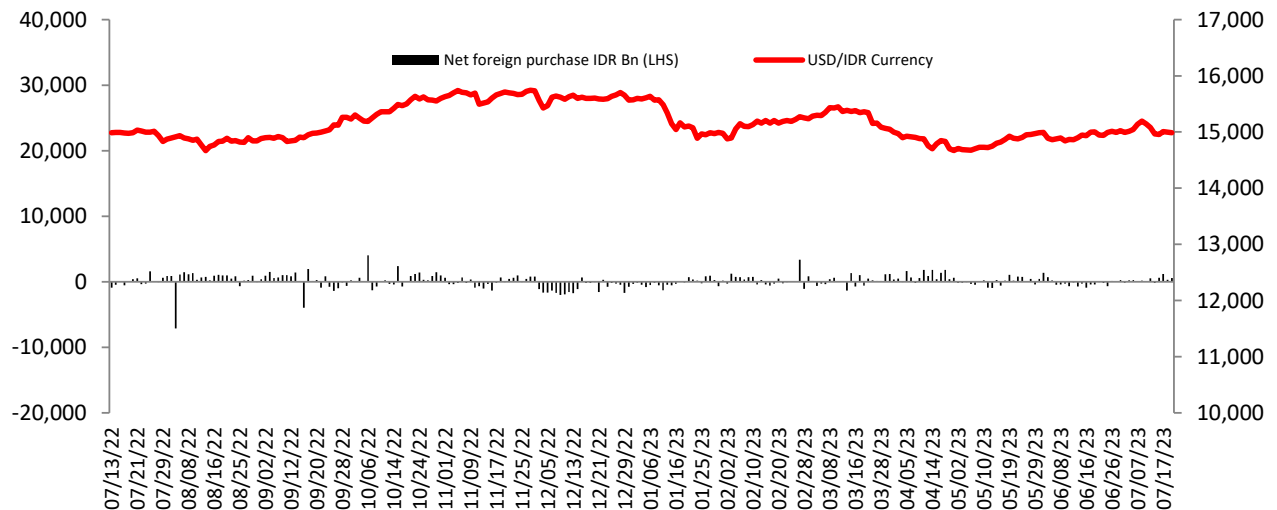
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GRAPHS & TABLES

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	98.0	0.0	1.9	5Y
FR82	FR0082 Govt	100.9	0.0	4.8	10Y
FR80	FR0080 Govt	100.1	(0.0)	3.4	15Y
FR83	FR0083 Govt	105.6	(0.0)	5.3	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,864.2	0.5	0.2	
Thailand	SET Index	1,521.2	(1.0)	(8.8)	
Korean Stock Exch.	KOSPI Index	2,600.2	(0.3)	16.3	
Straight Times	FSSTI Index	3,274.4	(0.0)	0.7	
Kuala Lumpur	KLCI Index	1,406.7	0.3	(5.9)	
Philippines	PCOMP Index	6,613.5	1.1	0.7	
Nikkei	NKY Index	32,490.5	(1.2)	24.5	
Hang Seng	HSI Index	18,928.0	(0.1)	(4.3)	
MSCI-Asia pacific	MXAP Index	167.9	(0.0)	7.8	
<u>Global Indices</u>					
Dow Jones	INDU Index	35,061.2	0.3	5.8	
S&P 500	SPX Index	4,565.7	0.2	18.9	
Nasdaq	CCMP Index	14,358.0	0.0	37.2	
FTSE 100	UKX Index	7,645.3	0.8	2.6	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,988.0	0.0	3.9
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,955.0	(1.4)	(4.9)
3 month	IDSWT3M Index	14,994.6	(0.1)	3.7
6 month	IDSWT6M Index	15,000.0	0.5	3.7
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,999.0	(0.1)	3.7
6 month	IDFWT6M Index	15,002.0	(0.0)	4.1

*price as of 7/19/2023


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